BxInventory

BIOINFORX

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USER MANUAL

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Introduction to BxInventory

What is BxInventory?

BxInventory is a completely redesigned **cloud-based** system based on our two separate systems: BxOrders and BxItems.BxInventoryis a secure cloud-based system with complete sets of tools to manage purchase orders and track item storage information.BxInventory features seamless integration of order request management with item storage tracking.

Overview

Purchase Order Tracking: while lab members can submit purchase order requests online, lab managers can confirm and approve requests, purchase items, and check off received items.

This module helps manage inventory costs with well-designed ordering processes, convenient tools to review historic requests and orders, and real-time summary reports for fund usage.

Item Location Tracking: Users can build storage hierarchy and record item storage information online quickly. With a web browser, users are ready to locate samples, move them between locations, track item usages and identify low-stock or expiring reagents.

With great flexibility and expandability, many small research laboratories, core facilities, and biotech companies have already adopted BxInventory.

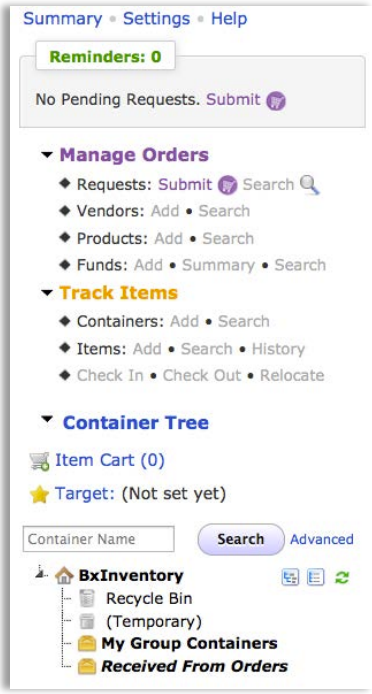
Get Started

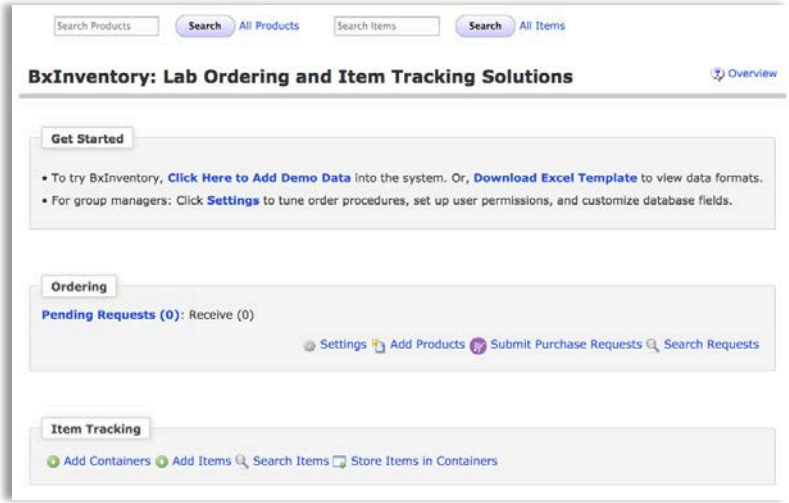
To start using BxInventory, please follow these steps:

1. Open a web browser (e.g., Google Chrome) and go to BioInfoRx website at http://bioinforx.com/
2. Go to BxInventory website by clicking on the icon:
   or go to web address http://bioinforx.com/bxinventory/
3. If you don't have a BioInfoRx account yet, **sign up** for a free account. Otherwise, **sign in** directly.

Section 1: BxInventory Home Screen

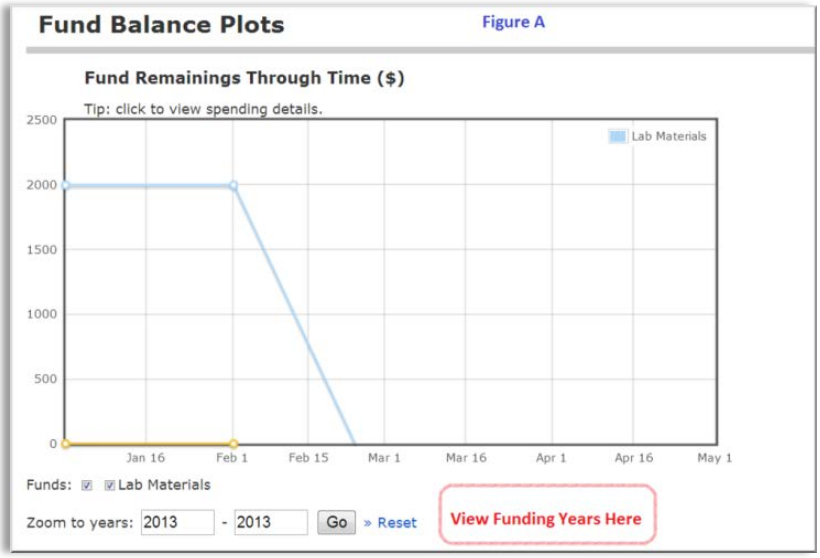
The BxInventory Home Screen is the first screen you will see when you log into the program. From here, you can get started using BxInventory.

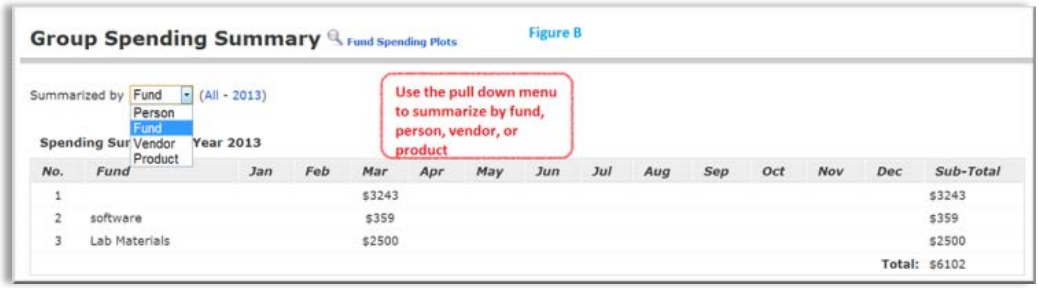




1.1: Fund Spending Plots and Review Group Spending Summary

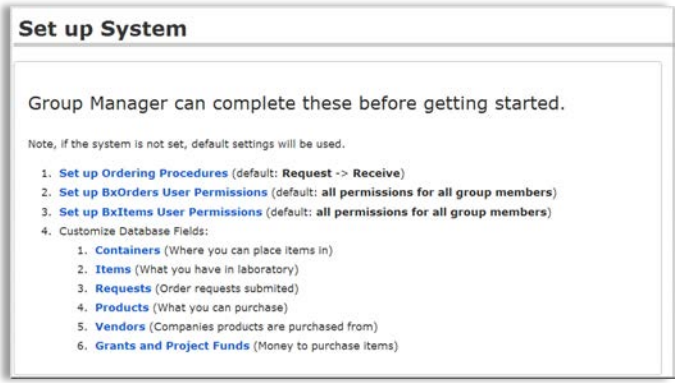
To review your fund spending, click **Fund Spending Plots** to see a plot graph of your overall spending and your group-spending summary. **Figure A** shows your funds spent and remaining. **Figure B** shows your group-spending summary.





1.2: Settings

Manage your BxInventory Settings before getting started. The Group Manager does this. From the **Home Screen**, click **Settings** and set up your system **(See Section 3, Setting Up BxInventory).**

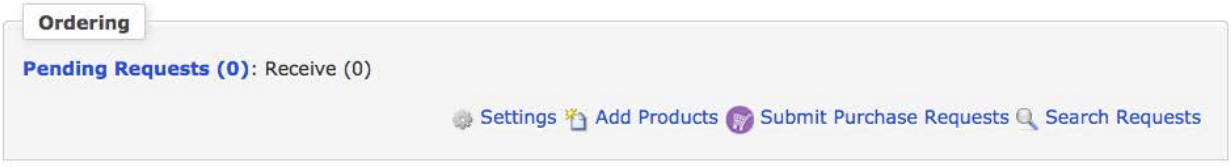


1.3: Add Demo Data and Download Excel Template

If you would like to add some demo data to try out the system, or download Excel Templates for demo purposes, click on the links on the home page. You will learn more about importing data in sections 3 and 4.

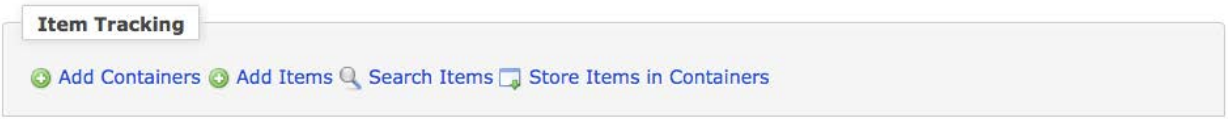
1.4: Manage Purchase Orders

The **Ordering** section will allow you to add vendors and products, submit purchase requests, or process order requests. These functions are covered in detail in **Section 3**.



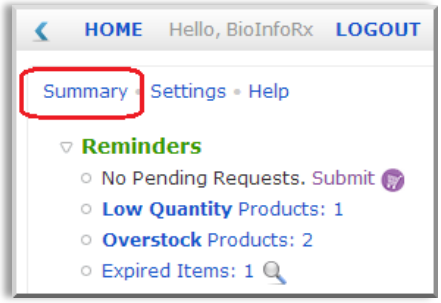
1.5: Track Item Storage Information

The **Item Tracking** area will allow you to add containers and items, and store your items. These functions are covered in detail in **Section 4**.

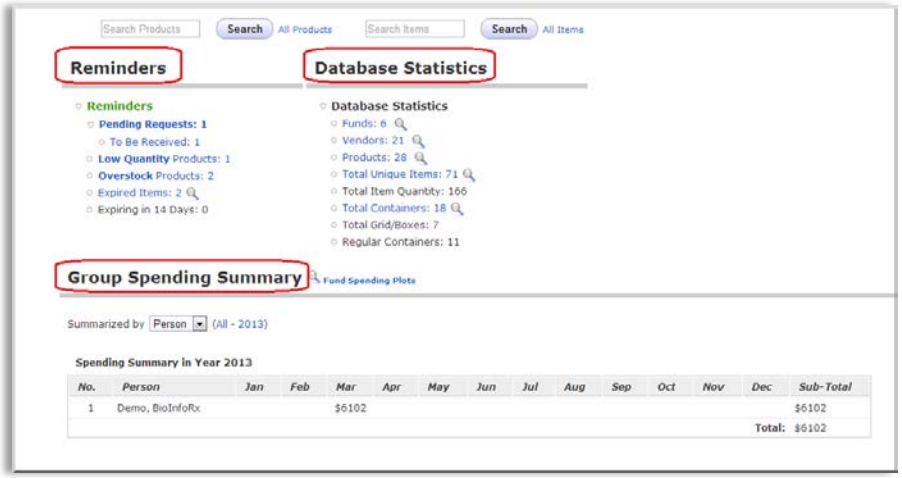


Section 2: BxInventory Summary Screen

Click the **Summary** link at the top right of the screen to view your inventory summary.



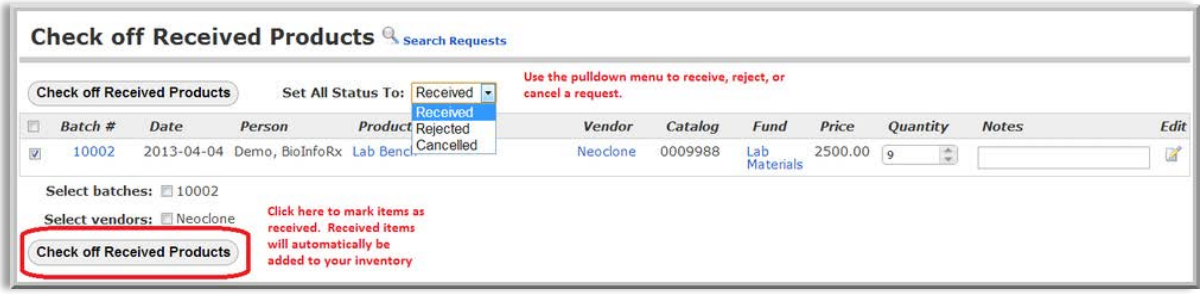
The summary screen contains reminders, database statistics, and your group spending summary.



2.1: Reminders

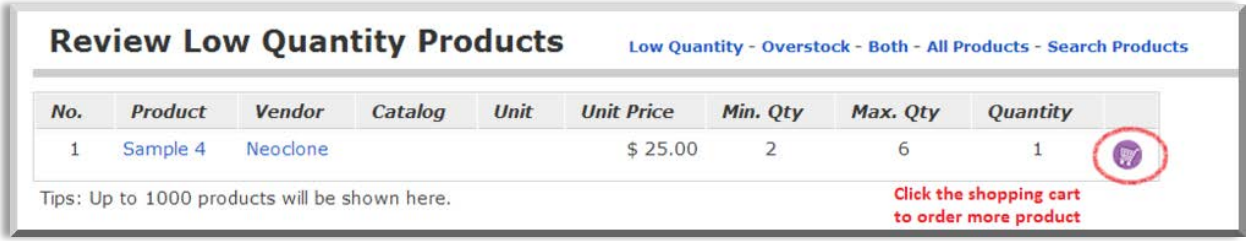
2.1.1: Pending Requests

If you have pending order requests, you will see a **To Be Received** link in your reminders. Click the link to mark the item as received.



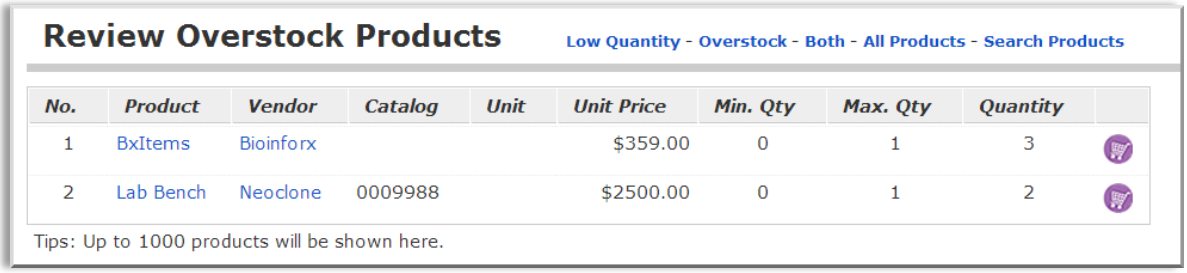
2.1.2: Low Quantity Products

The system will remind you if you have any low quantity products to re-order. Click the **Low Quantity Products** link under your reminders to view low quantity items.



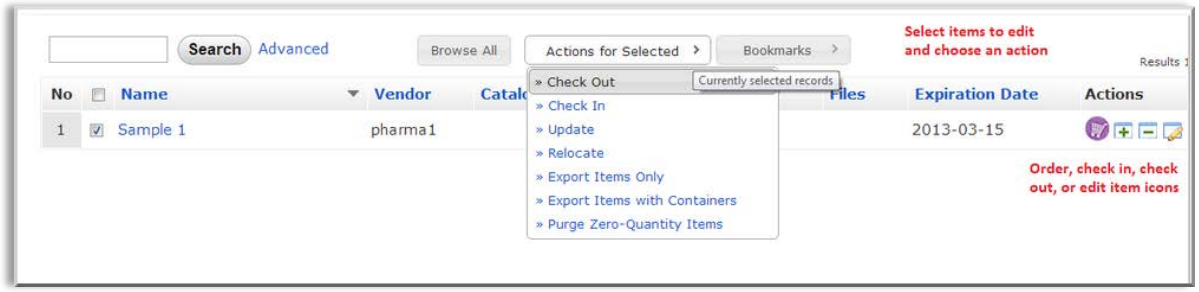
2.1.3: Overstock Products

If your items are overstocked, the reminder screen will alert you. Click the **Overstock Products** link to view overstocked items.



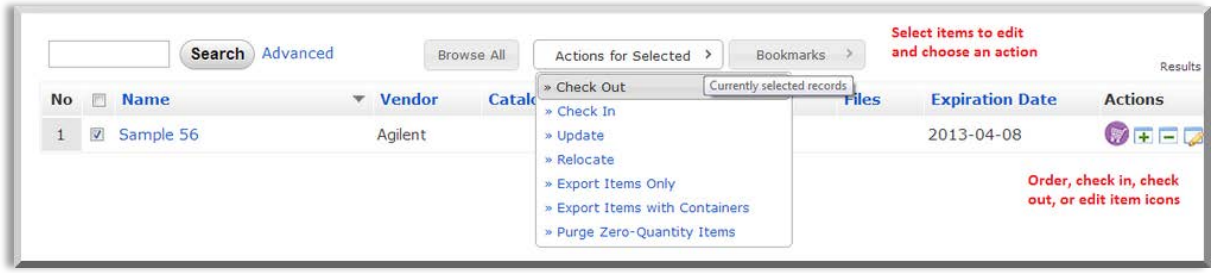
2.1.4: Expired Items

From the summary page, click the **Expired Items** link to view all items past expiration date. You may edit the items from this page.



2.1.5: Items Expiring in 14 days

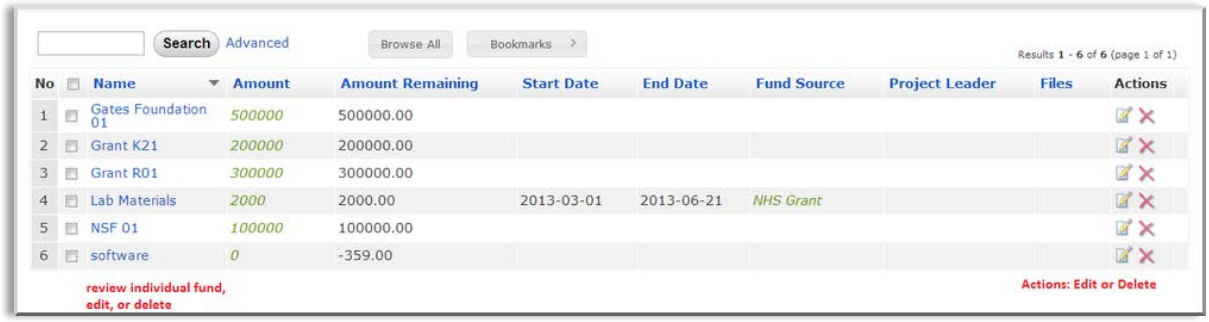
From the summary page, click the **Expiring in 14 Days** link to view all items soon to expire. You may edit the items from this page.



2.2: Database Statistics

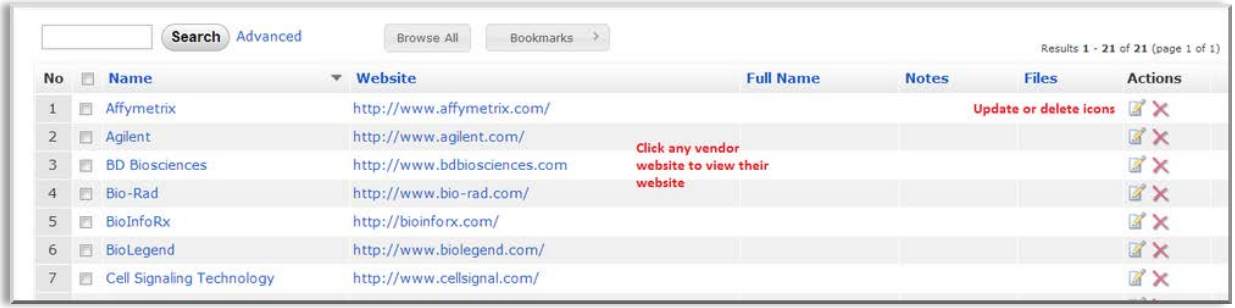
2.2.1: Funds

From the summary page, click the **Funds** link under **Database Statistics**. From this link, you may review funds, edit, or delete.



2.2.2: Vendors

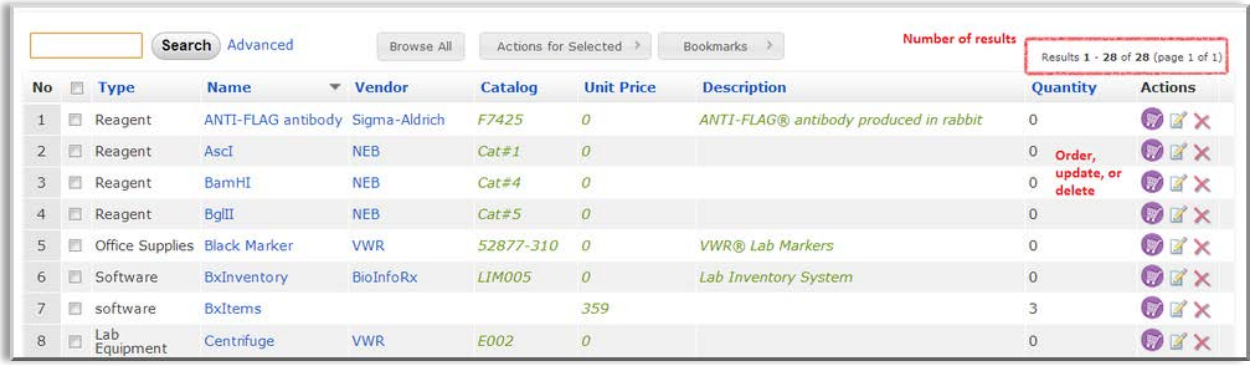
From the summary page, click the **Vendors** link to view current vendors. You may update or delete vendors from this page, or view their website.



No	Name	Website	Full Name	Notes	Files	Actions
1	Affymetrix	http://www.affymetrix.com/				
2	Agilent	http://www.agilent.com/				
3	BD Biosciences	http://www.bdbiosciences.com				
4	Bio-Rad	http://www.bio-rad.com/				
5	BioInfoRx	http://bioinforx.com/				
6	BioLegend	http://www.biolegend.com/				
7	Cell Signaling Technology	http://www.cellsignal.com/				

2.2.3: Products

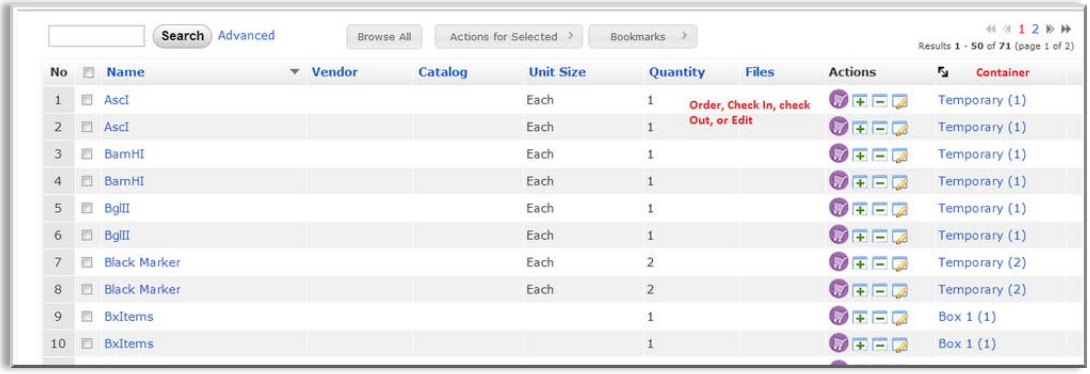
From the summary page, click the **Products**link to view all current products in the database. You may order, update or delete products from this page.



No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	
2	Reagent	AscI	NEB	Cat#1	0		0	
3	Reagent	BamHI	NEB	Cat#4	0		0	
4	Reagent	BglII	NEB	Cat#5	0		0	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers	0	
6	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System	0	
7	software	BxItems			359		3	
8	Lab Equipment	Centrifuge	VWR	E002	0		0	

2.2.4: Total Unique Items

Unique items are items that are different. Some items may be in a batch and share the same barcode. From the Summary Page, click the **Unique Items** link to view your total unique items and the quantity in each batch.



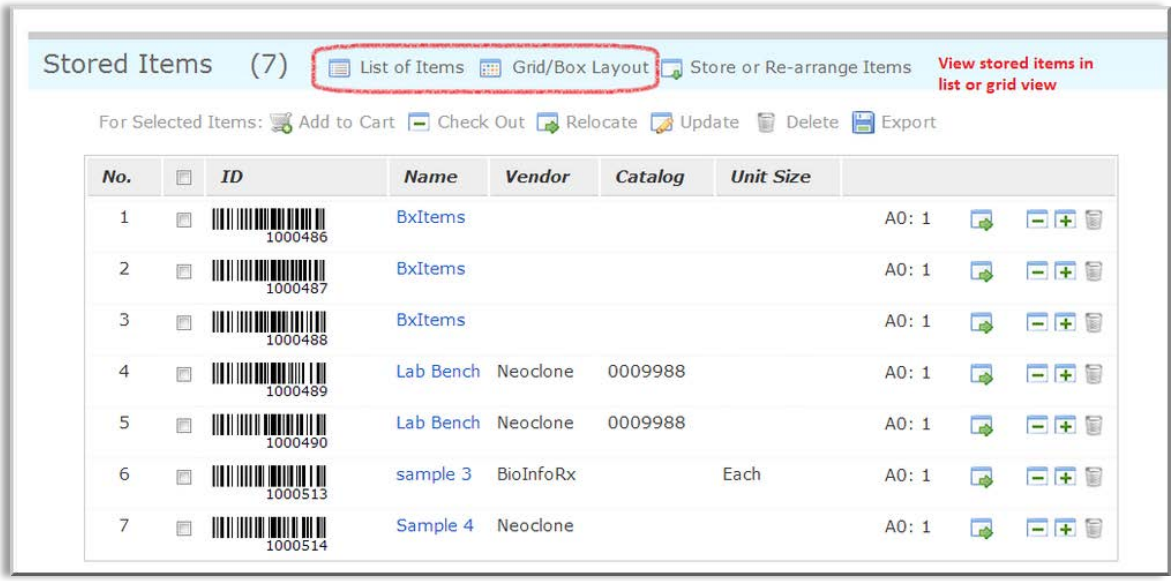
No	Name	Vendor	Catalog	Unit Size	Quantity	Files	Actions	Container
1	AscI			Each	1			Temporary (1)
2	AscI			Each	1			Temporary (1)
3	BamHI			Each	1			Temporary (1)
4	BamHI			Each	1			Temporary (1)
5	BglII			Each	1			Temporary (1)
6	BglII			Each	1			Temporary (1)
7	Black Marker			Each	2			Temporary (2)
8	Black Marker			Each	2			Temporary (2)
9	BxItems				1			Box 1 (1)
10	BxItems				1			Box 1 (1)

2.2.5: Total Item Quantity

The total item quantity is the total number of items in inventory, including all batches.

2.2.6: Total Containers

To view all containers, click the **Total Containers** link under **Database Statistics**. Click on any container to view its subcontainers and/or stored items.



2.2.7: Total Grid/Boxes

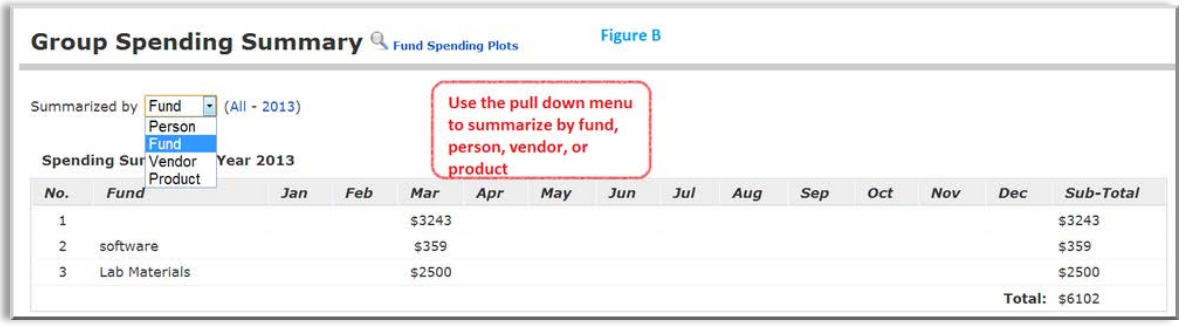
The **Total Grid/Boxes** in the Database Statistics represents how many storage boxes with grids are created in the system.

2.2.8: Regular Containers

The **Regular Containers** under Database Statistics indicate containers that do not have specified grids. The sum of Grid/Boxes and Regular containers should equal the number of total containers.

2.3: Group Spending Summary

The group spending summary is displayed on the summary page as well as the home page. **See Section 1.1** for more details.



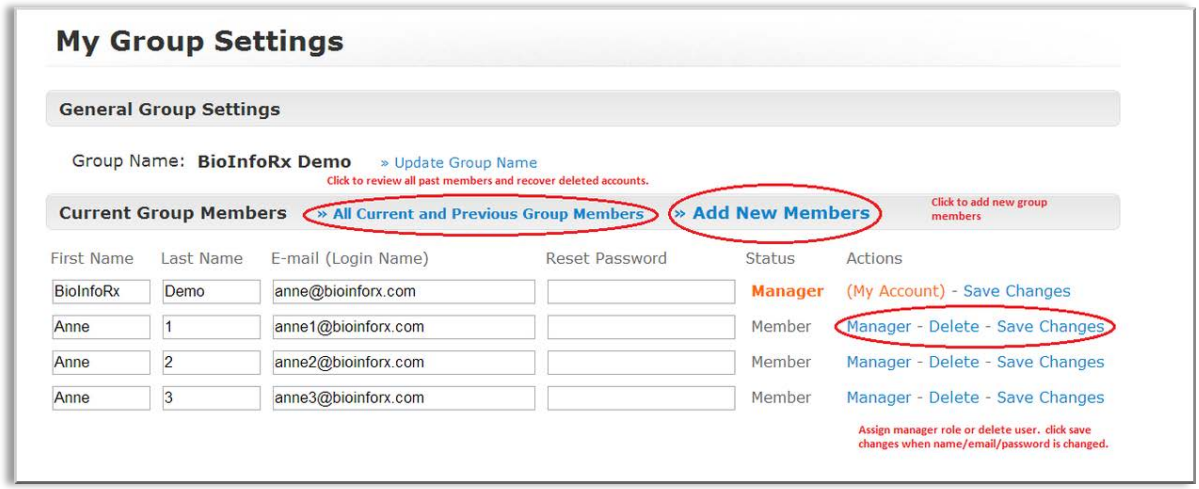
Section 3: Setting Up BxInventory

3.1: Add Group Members

BxInventory supports multiple users, with all data updated dynamically. Each group member can be logged in at any location, and added data will be updated in real time.

Click on the **Account Settings** tool in the top menu bar to add members.

Click **My Group Settings** to add and edit group members.



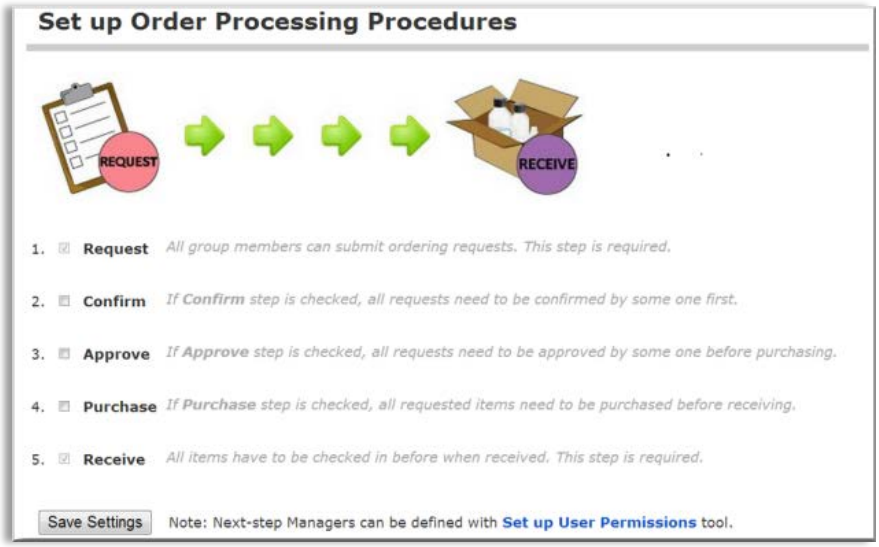
The group manager can edit, remove, or add group members at any time.

3:2: Set Up System

Click the **Settings** link in the navigation menu or from the home screen to set up your BxInventory system. This is not required if you wish to use the default settings. **Only Group Managers may set up the system.**

3.2.1: Set Up Ordering Procedures

Request and Receive are required/default settings. If you wish to add confirm, approve, and purchase, check the steps desired and save.

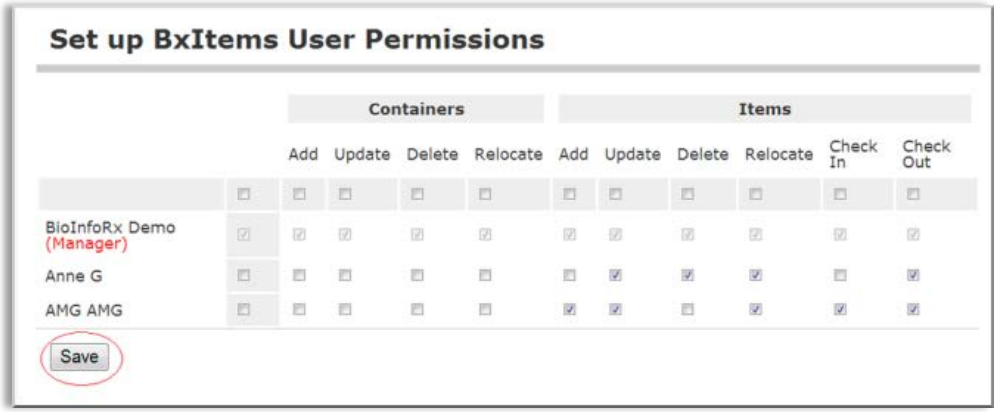


3.2.2: Set up BxOrders User Permissions

By default, all group members have full permissions. To change permissions for non-managers, uncheck controls not allowed for each user. Managers will always have full control by default. Be sure to save your settings.

3.2.3: Set Up Bxitems User Permissions

By default, all group members have full permissions. To change permissions for non-managers, uncheck controls not allowed for each user. Managers will always have full control by default. Be sure to save your settings.



3.2.4: Set up Container fields

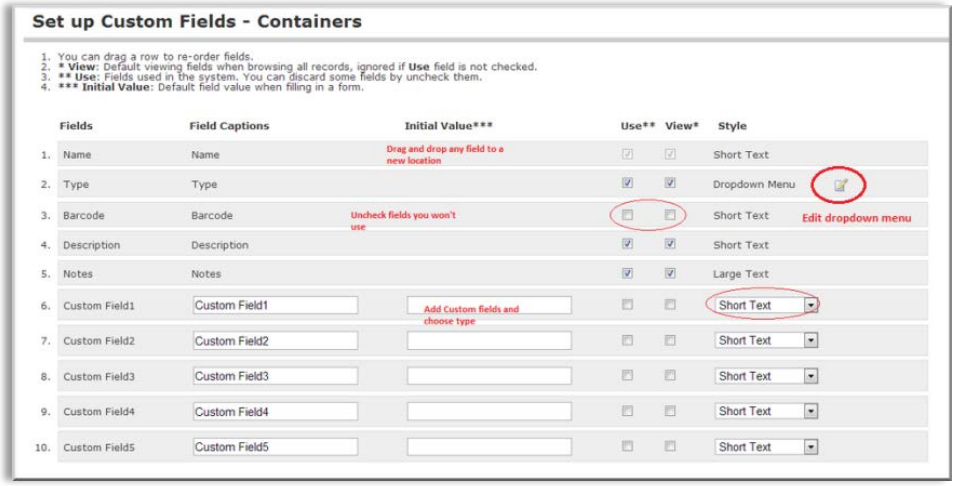
BxInventory contains 5 standard fields and 9 custom fields for containers. You may edit the standard fields, or add custom fields of your own. Uncheck categories you do not want to use, or check categories you want to use. Create a field caption, initial value (if applicable), and the style. To use and view the fields, check the appropriate boxes.

To add custom fields, type a field name and use the **dropdown**menu to create a field style.

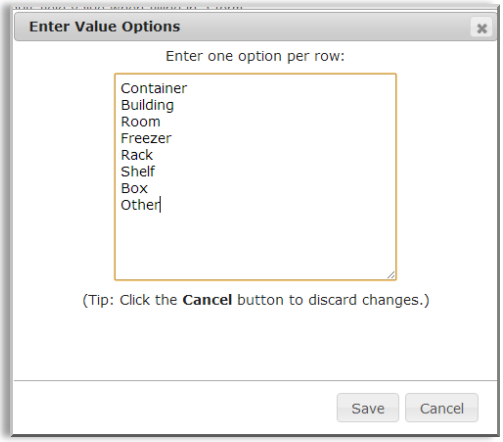
You may add an Initial Value to any field if all items in that field will begin with the same prefix.

The **Container ID** is a system generated barcode number. Use the barcode field onlyif you wish to input your own barcodes.

In any setup field area, you can **drag a row** to rearrange fields. Simply click and hold on any field's gray bar and drag it to the desired location.

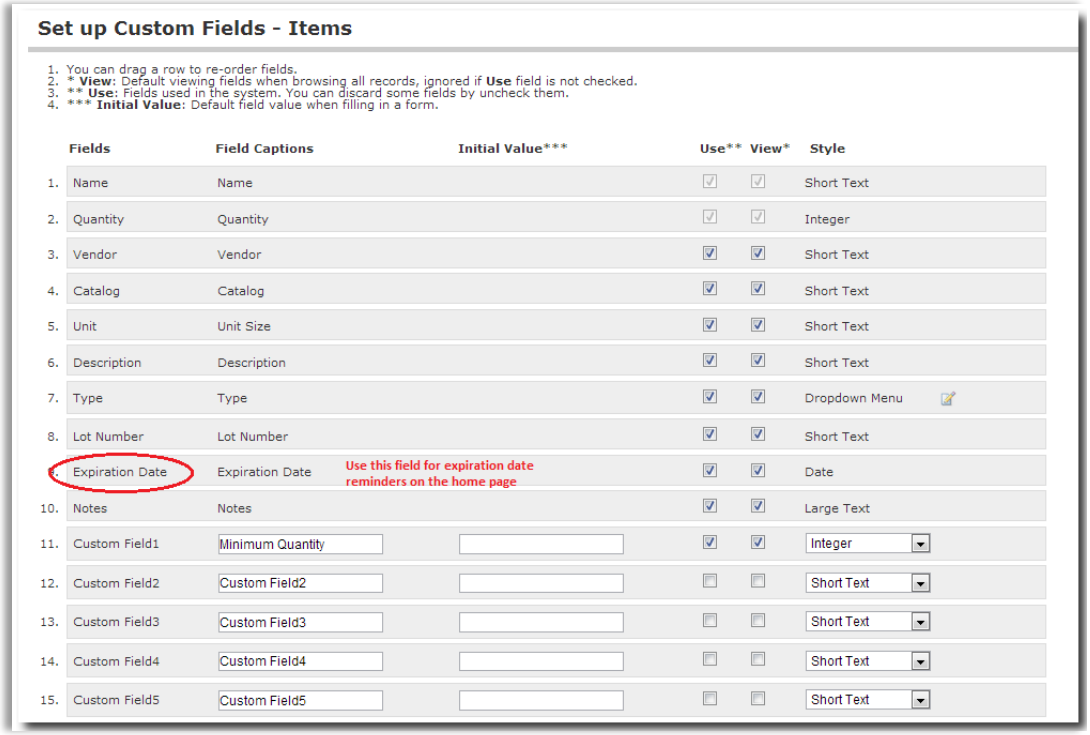


Pull down menus are set up by clicking the edit image next to dropdown menu. Add one field per line and save.

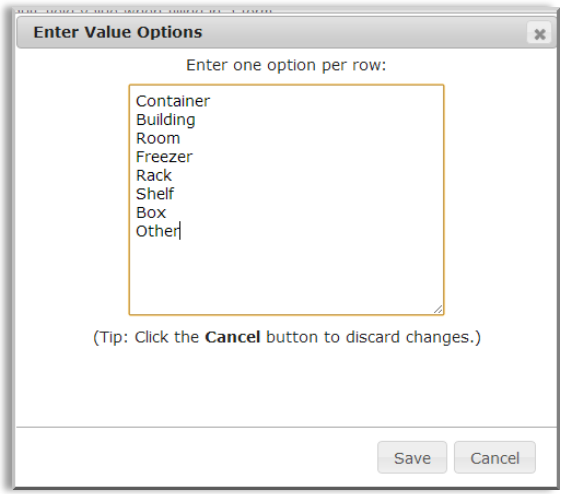


3.2.5: Set Up Item fields

Bxitems contains 10 standard fields and 5 custom fields for items. Setup is the same as setting up containers. **Note that the Expiration Date field will trigger the expiration date reminders.**

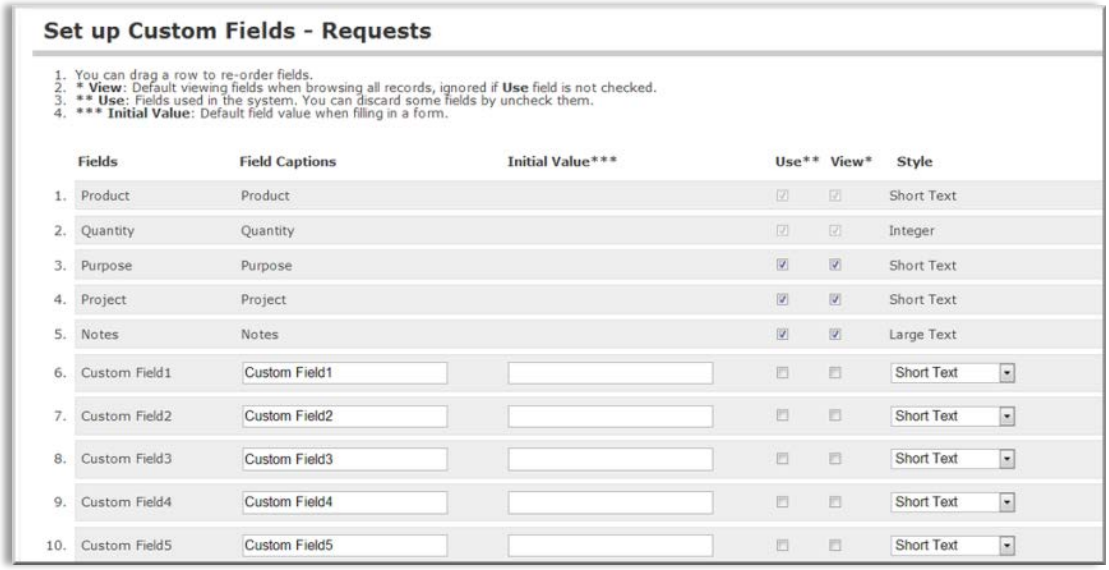


To create or edit pull down menus, click on the image next to dropdown menu, and add fields one per line. These will appear in your new dropdown menu (See section 3.2.4).



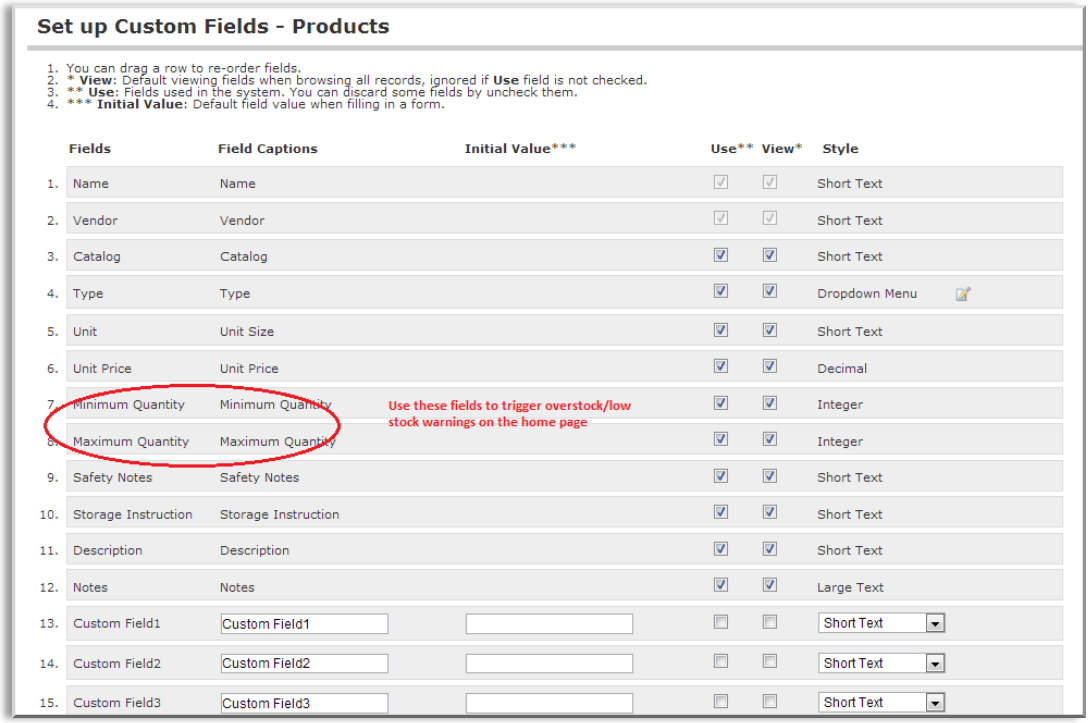
3.2.6: Set up Request Fields

Requests contains 5 standard fields and 5 custom fields. Setup is the same as setting up container or item fields. Note that product and quantity are required fields.
Remember to **SUBMIT**in each setup area! Use the pull down menu to define the type of custom fields you are adding.



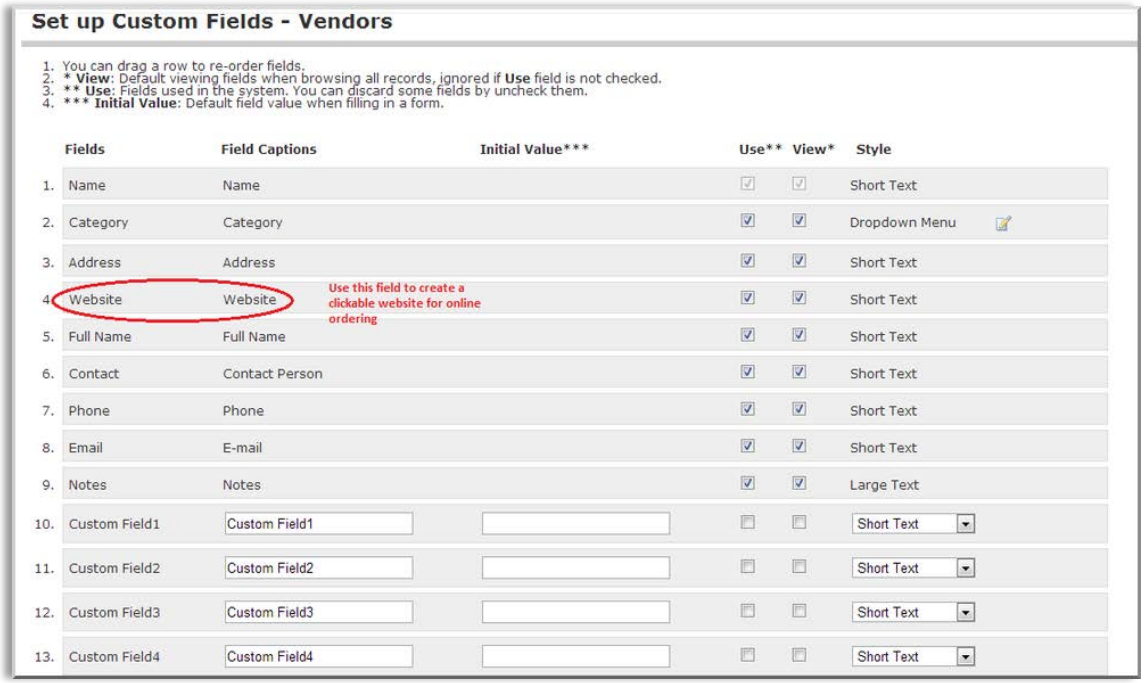
3.2.7: Setup Product Fields

Products contains 12 standard fields and 5 custom fields. Setup is the same as other field setups. Note that using the minimum/maximum quantity fields will trigger the low stock or overstock reminder on the settings page.



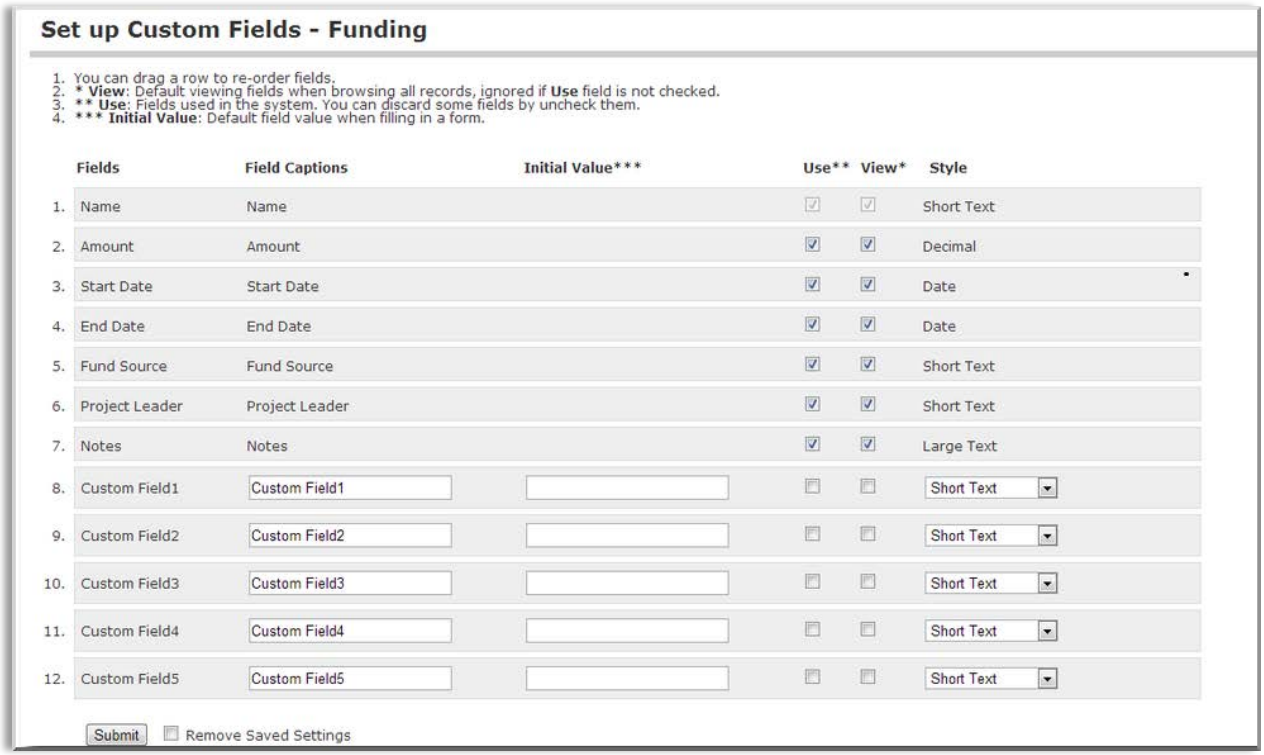
3.2.8: Set Up Vendor Fields

Vendors contains 9 standard fields and 5 custom fields. Setup is the same as other field setups. Use the vendor website field to create direct links to the vendor website for online ordering.



3.2.9: Set up Grants and Project Funds Fields

Funding contains 7 standard fields and 5 custom fields. Setup is the same as other field setups. The start date, end date, and funding amounts will help you to keep track of spending and budgets.



Set up Custom Fields - Funding

1. You can drag a row to re-order fields.
2. * **View**: Default viewing fields when browsing all records, ignored if **Use** field is not checked.
3. ** **Use**: Fields used in the system. You can discard some fields by uncheck them.
4. *** **Initial Value**: Default field value when filling in a form.

	Fields	Field Captions	Initial Value***	Use**	View*	Style
1.	Name	Name		☑	☑	Short Text
2.	Amount	Amount		☑	☑	Decimal
3.	Start Date	Start Date		☑	☑	Date
4.	End Date	End Date		☑	☑	Date
5.	Fund Source	Fund Source		☑	☑	Short Text
6.	Project Leader	Project Leader		☑	☑	Short Text
7.	Notes	Notes		☑	☑	Large Text
8.	Custom Field1	Custom Field1		☐	☐	Short Text
9.	Custom Field2	Custom Field2		☐	☐	Short Text
10.	Custom Field3	Custom Field3		☐	☐	Short Text
11.	Custom Field4	Custom Field4		☐	☐	Short Text
12.	Custom Field5	Custom Field5		☐	☐	Short Text

Submit ☐ Remove Saved Settings

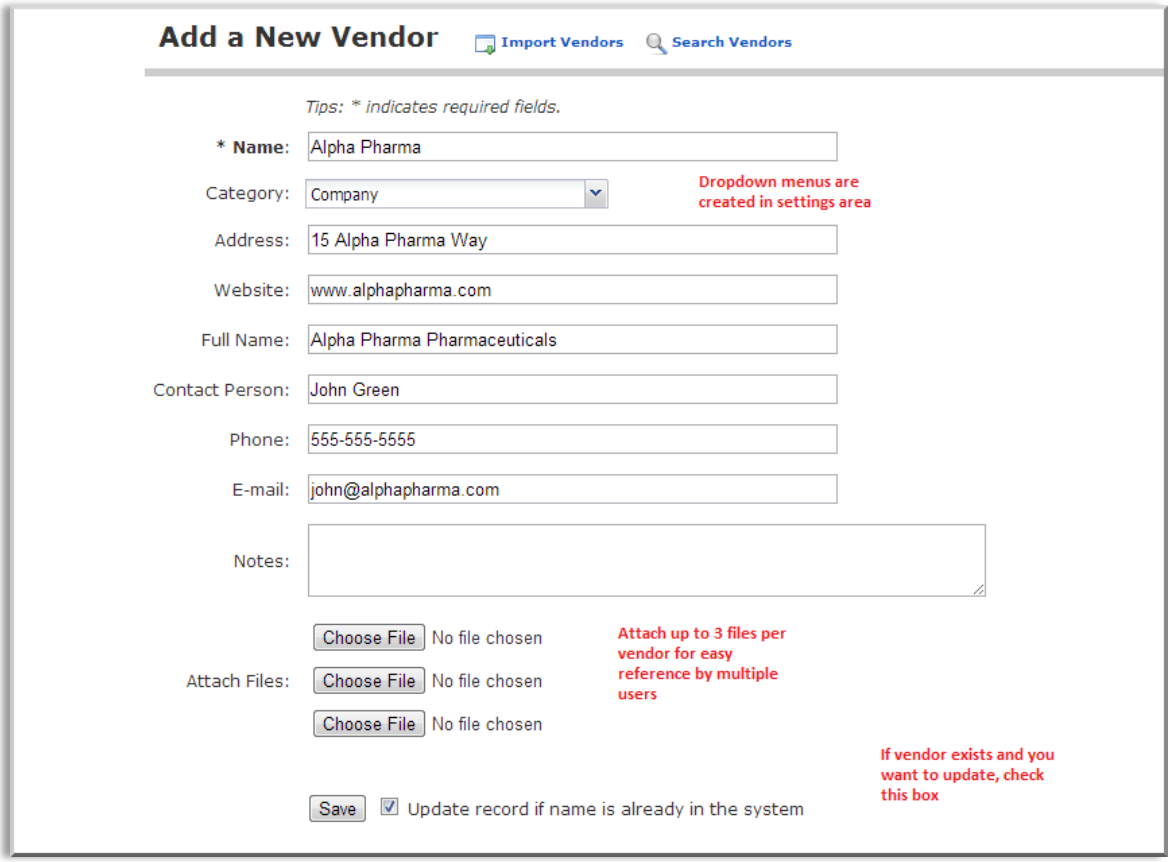
Section 4: Manage Purchase Orders

4.1: Vendors

4.1.1: Add Vendors

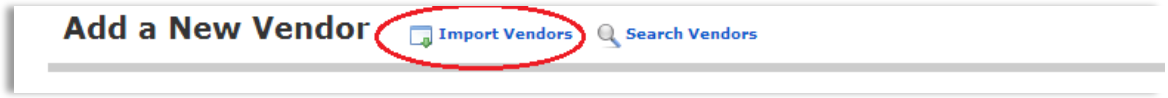
To add vendors, choose the **Add Vendors** Link under Manage Purchase orders from the Home screen, or **Vendors: Add** from the left menu under the **Manage Orders** header.

To add vendors one at a time, fill in the fields and save. You may attach up to 3 files. The fields are created in your settings area (see section 3.2.8).



4.1.2: Import Vendors

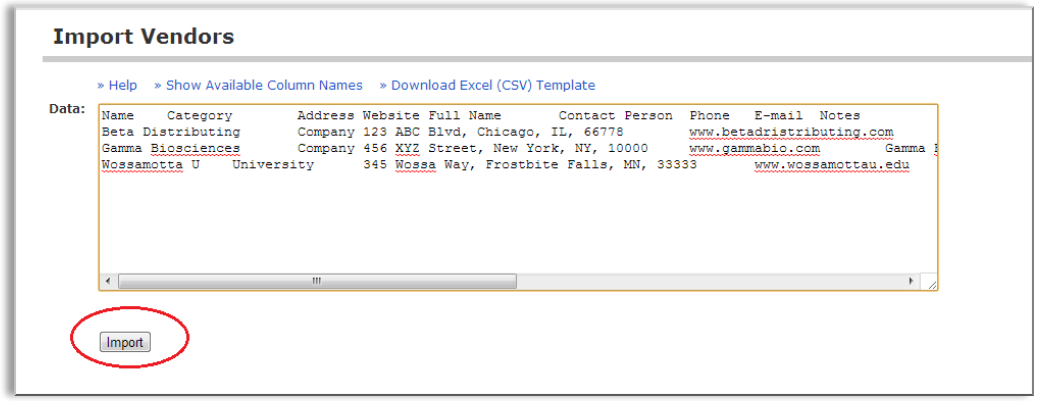
Step 1: To import several vendors to BxInventory at once, click **Import Vendors** from the **Add New Vendor** screen.



Step 2: Download the Excel Template to add your vendors. If you have several vendors already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required field is Vendor Name, other fields may be deleted or left blank if not needed. Add as many vendors to the spreadsheet as you wish. An example of the format is shown below.

	A	B	C	D	E	F	G	H	I
1	Name	Category	Address	Website	Full Name	Contact Person	Phone	E-mail	Notes
2	Beta Distributing	Company	123 ABC Blvd, Chicago, IL, 66778	www.betadristributing.com	Beta Distributing	Jane Smith	555-555-1234	jane@betadistributing.com	preferred
3	Gamma Biosciences	Company	456 XYZ Street, New York, NY, 10000	www.gammabio.com	Gamma Biosciences	Joe Black	555-123-4567	info@gammabio.com	
4	Wossamotta U	University	345 Wossa Way, Forstbite falls, MN, 33333	www.wossamottau.edu	University of Wossamata	Bullwinkle J. Moose	555-333-3333	bull@wossamottau.edu	Brrr!

Step 3: Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in he example below, and click the Import Button.



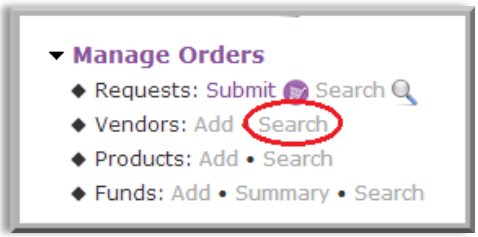
Step 4: Click Refresh when prompted, and you will be directed to the Vendor list. Your new vendors will appear in the list.

No	Name	Website	Full Name	Notes	Files	Actions
1	Affymetrix	http://www.affymetrix.com/				
2	Agilent	http://www.agilent.com/				
3	BD Biosciences	http://www.bdbiosciences.com				
4	Beta Distributing	www.betadistributing.com	*Beta Distributing*	*preferred*		
5	Bio-Rad	http://www.bio-rad.com/				
6	BioInfoRx	http://bioinforx.com/				
7	BioLegend	http://www.biolegend.com/				
8	Cell Signaling Technology	http://www.cellsignal.com/				
9	Clontech	http://www.clontech.com/				
10	Eppendorf	http://eshop.eppendorfna.com/				
11	Gamma Biosciences	www.gammabio.com	*Gamma Biosciences*			
12	Life Technologies	http://www.lifetechnologies.com				
13	Millipore	http://www.emdmillipore.com				
14	NEB	http://www.neb.com/				
15	Neoclone	http://www.neoclone.com				
16	Promega	http://www.promega.com/				
17	Qiagen	http://www.qiagen.com/				
18	Roche Applied Science	https://www.roche-applied-science.com/				
19	Santa Cruz Biotechnology	http://www.scbt.com/				
20	Sigma-Aldrich	http://www.sigmaaldrich.com				
21	Thermo Fisher	http://www.thermofisher.com				
22	USA Scientific	http://www.usascientific.com/				
23	VWR	https://us.vwr.com/store/				
24	Wossamotta U	www.wossamottau.edu	*University of Wossamata*	*Brrr!*		

4.1.3: Search, Review, and Edit Vendors

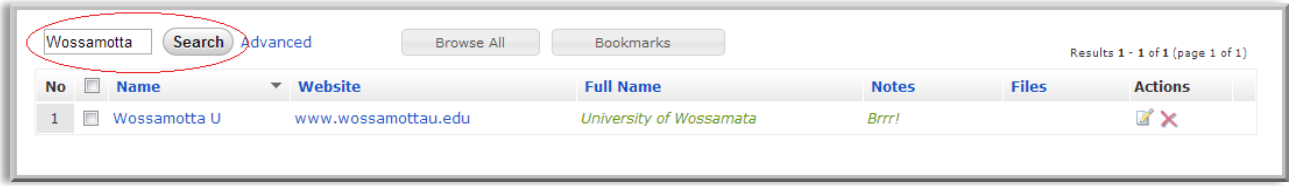
4.1.3.1: Search Vendors

To search vendors, click **Vendors: Search** under Manage Orders.



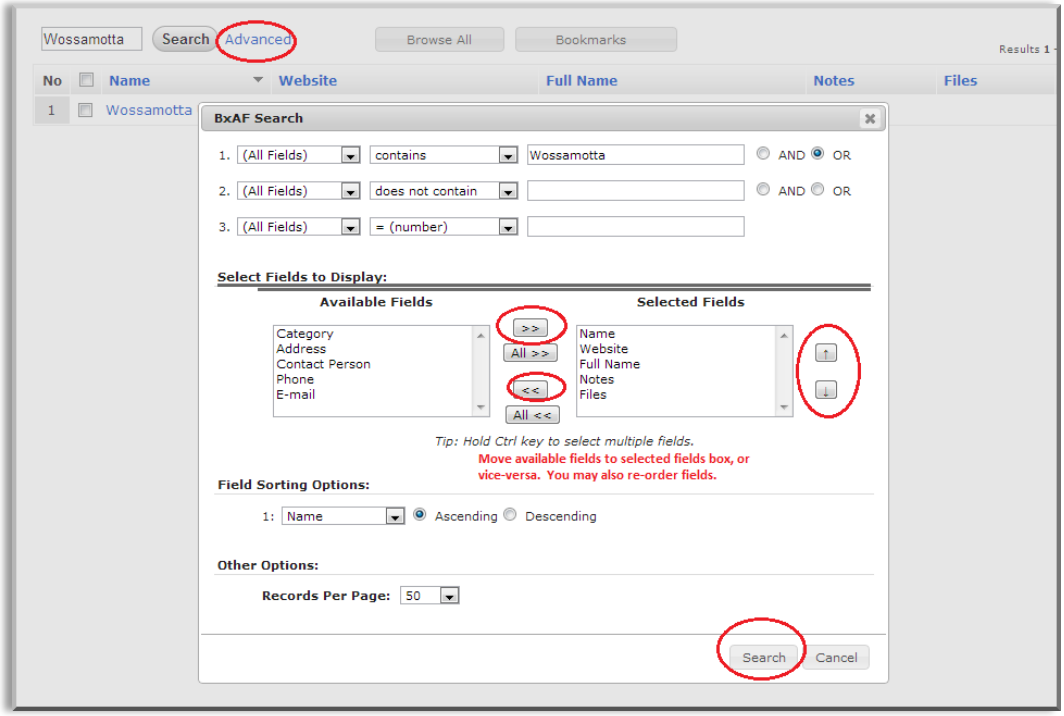
4.1.3.2: Basic Search

To perform a simple search, simply type in any search term in the search box and click**Search**.



4.1.3.3: Advanced Search

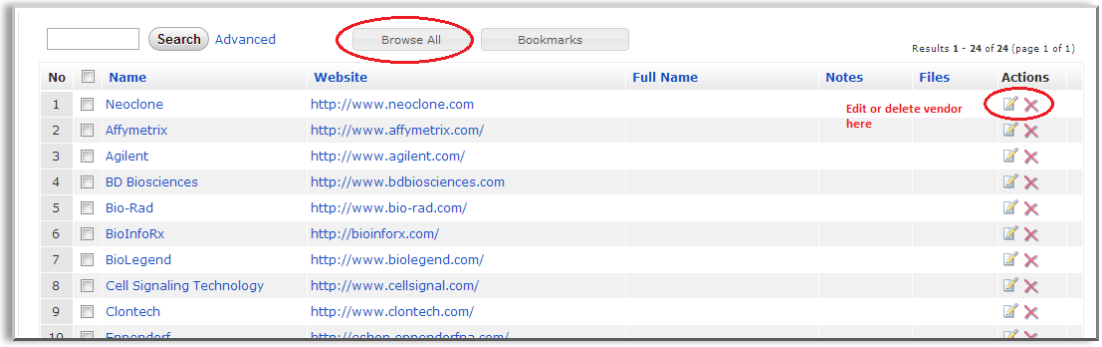
The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.



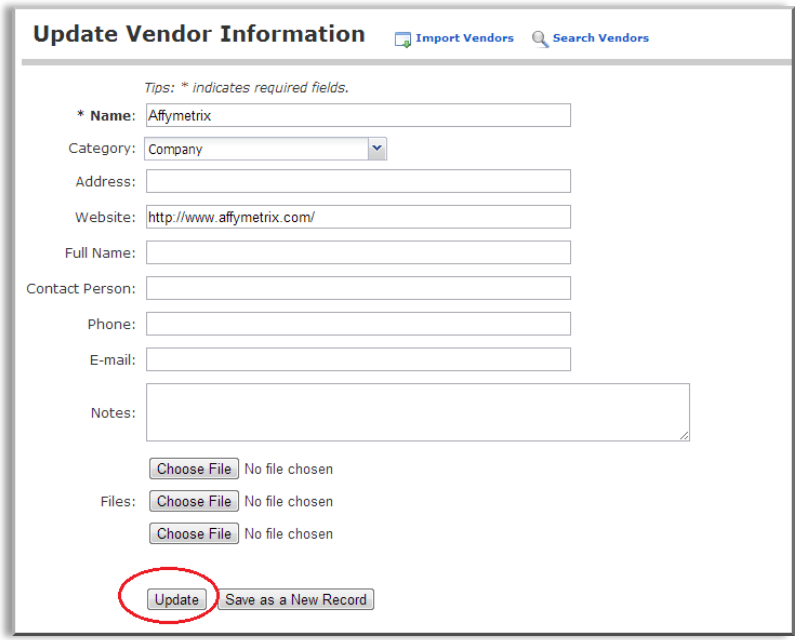
4.1.3.4: Edit Vendors

Vendor information may be updated at any time. From the **Search Vendors** Area, you may search a vendor or browse all and select from the list to update using the update icon. Vendors may also be deleted from this area.

**** Clicking the red X will delete the vendor*****

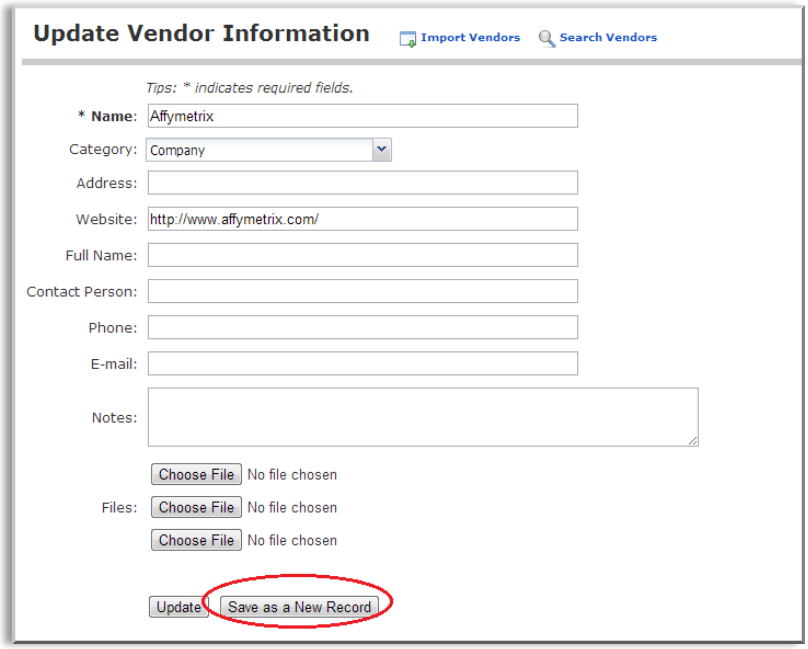


Click the pencil icon to edit the vendor and update.



4.1.3.5: Create a New Vendor by Updating an Existing Similar Vendor

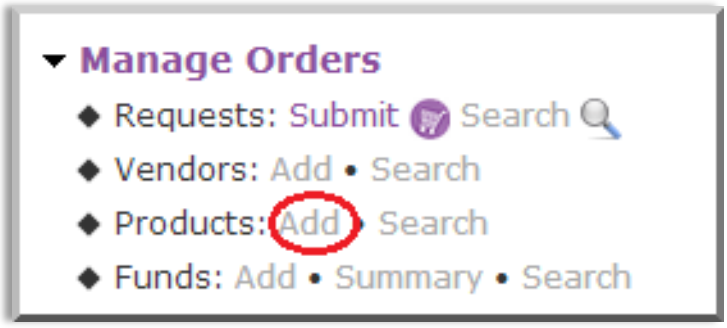
Quickly and easily create new vendors by updating an existing vendor with similar attributes. Save as a new record, and BxInventory will create a new vendor while maintaining the existing record.



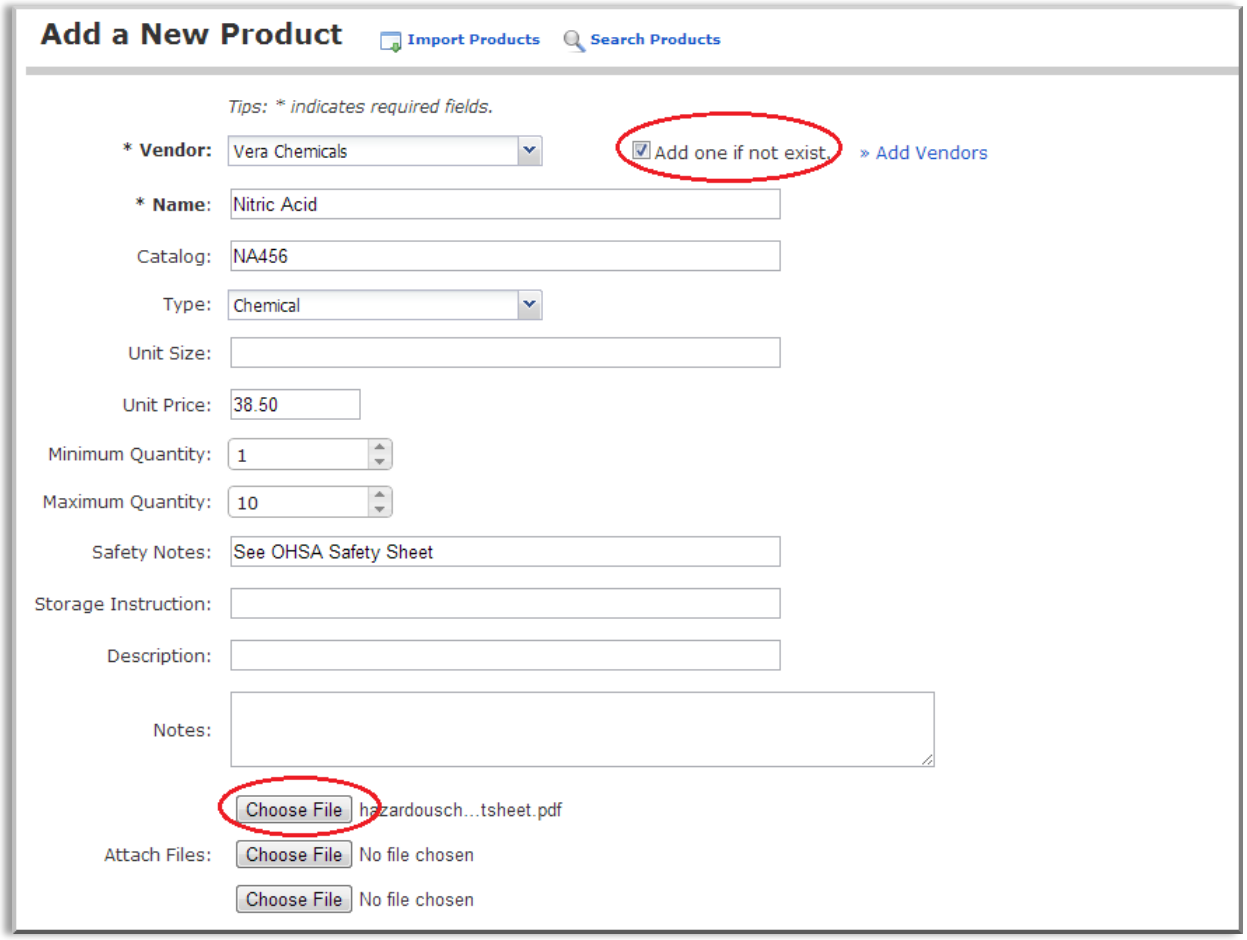
4.2: Products

4.2.1: Add Products

To add new products, click the **Add Products** link on the home page or in the sidebar menu.

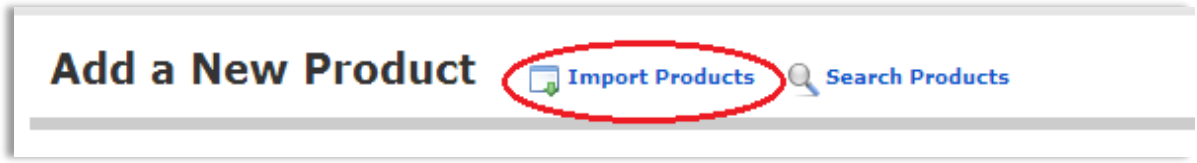


Fill in required fields with *, all other fields are optional. Use the Vendor pull down menu, or type in a vendor name to add one. You may also attach files related to the product.


Add a New Product
Import Products
Search Products
Tips: * indicates required fields.
* Vendor:
Vera Chemicals
Add one if not exist.
» Add Vendors
* Name:
Nitric Acid
Catalog:
NA456
Type:
Chemical
Unit Size:
Unit Price:
38.50
Minimum Quantity:
1
Maximum Quantity:
10
Safety Notes:
See OHSA Safety Sheet
Storage Instruction:
Description:
Notes:
Choose File
hazardousch...tsheet.pdf
Attach Files:
Choose File
No file chosen
Choose File
No file chosen

4.2.2: Import Products

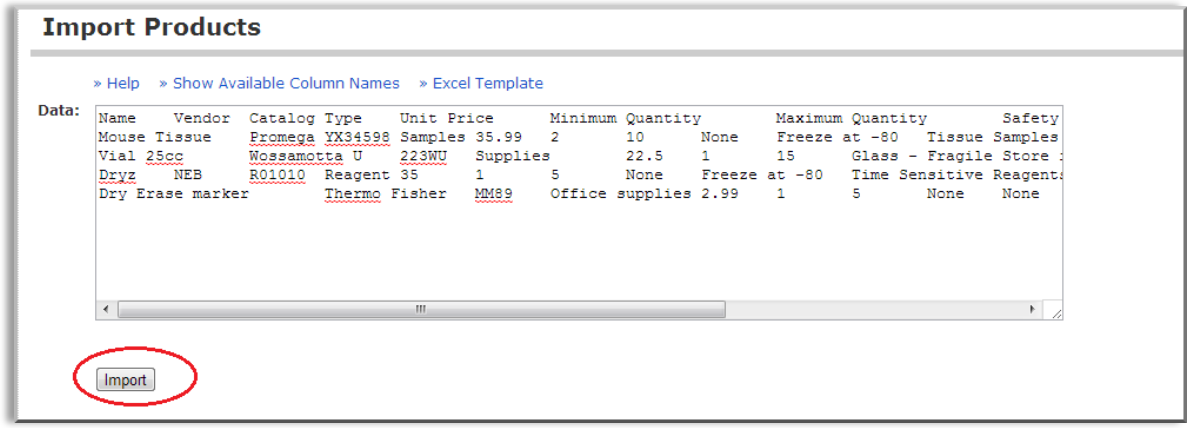
Step 1: From the **Add a New Product** Page, select **Import Products**.



Step 2: Download the Excel Template to add your products. If you have several products already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required fields are vendor name and product name; other fields may be deleted or left blank if not needed. Add as many products to the spreadsheet as you wish. An example of the format is shown below.

Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety Notes	Storage Instruction	Description
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None	Freeze at -80	Tissue Samples
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile	Store in bubble wrap	Glass Vials
Dryz	NEB	R01010	Reagent	35	1	5	None	Freeze at -80	Time Sensitive Reagents
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None	None	Dry Erase marker-Red

Step 3: Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.

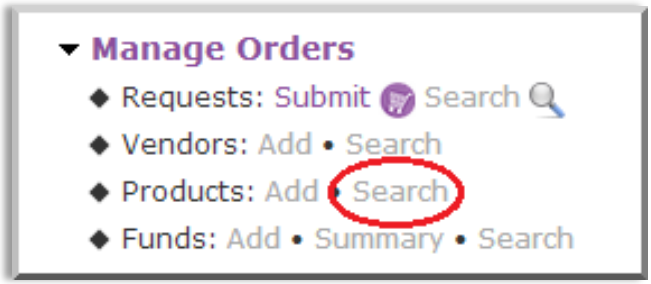


Step 4: Click Refresh when prompted and you will be directed to the Product list. Your new products will appear in the list.

No	Type	Name	Vendor	Catalog	Unit Price	Description
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit
2	Reagent	AscI	NEB	Cat#1	0	
3	Reagent	BamHI	NEB	Cat#4	0	
4	Reagent	BglII	NEB	Cat#5	0	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers
6	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System
7	software	BxItems			359	
8	Lab Equipment	Centrifuge	VWR	E002	0	
9	Reagent	ClaI	NEB	Cat#7	0	
10	Office Supplies	Copy Paper	Thermo Fisher	V012	0	
11	Reagent	DpnI	NEB	Cat#8	0	
12	Office supplies	Dry Erase marker	Thermo Fisher	MM89	2	Dry Erase marker-Red
13	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents
14	Reagent	EcoRI	NEB	R0101L	0	
15	Office Supplies	Folders	Thermo Fisher	V001	0	
16	Equipment	Lab Bench	Neoclone	0009988	2500	
17	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Glove
18	Lab Equipment	Microscope	VWR	E001	0	
19	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System
20	Samples	Mouse Tissue	Promega	YX34598	35	Tissue Samples
21	Reagent	pBR322	Life Technologies	Plasmid01	0	

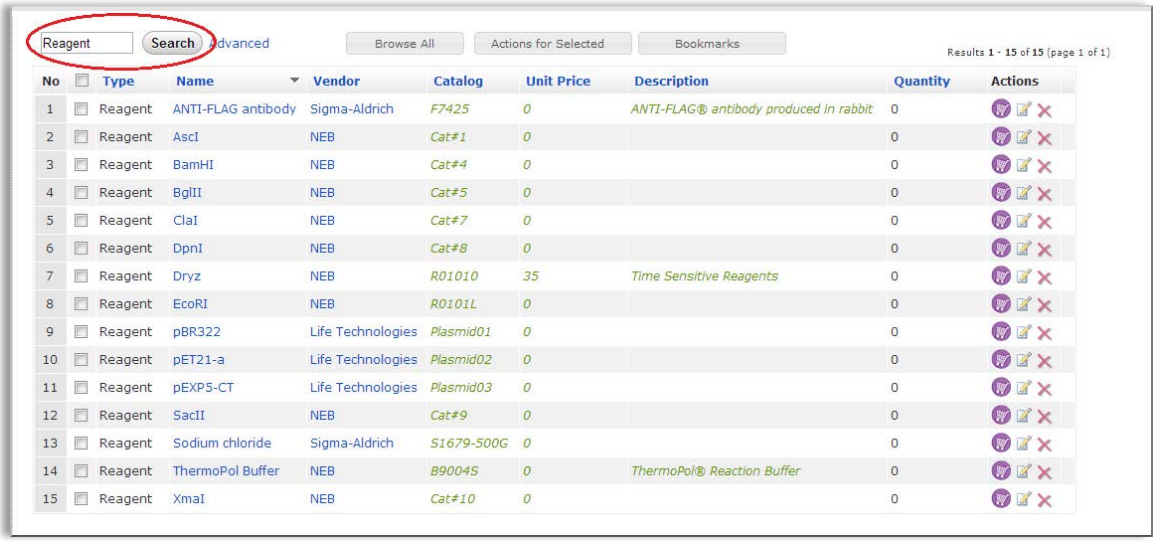
4.2.3: Search, Review, and Edit Products

To search products, click **Products: Search** under**Manage Orders** in the Left Sidebar.



4.2.3.1: Basic Search

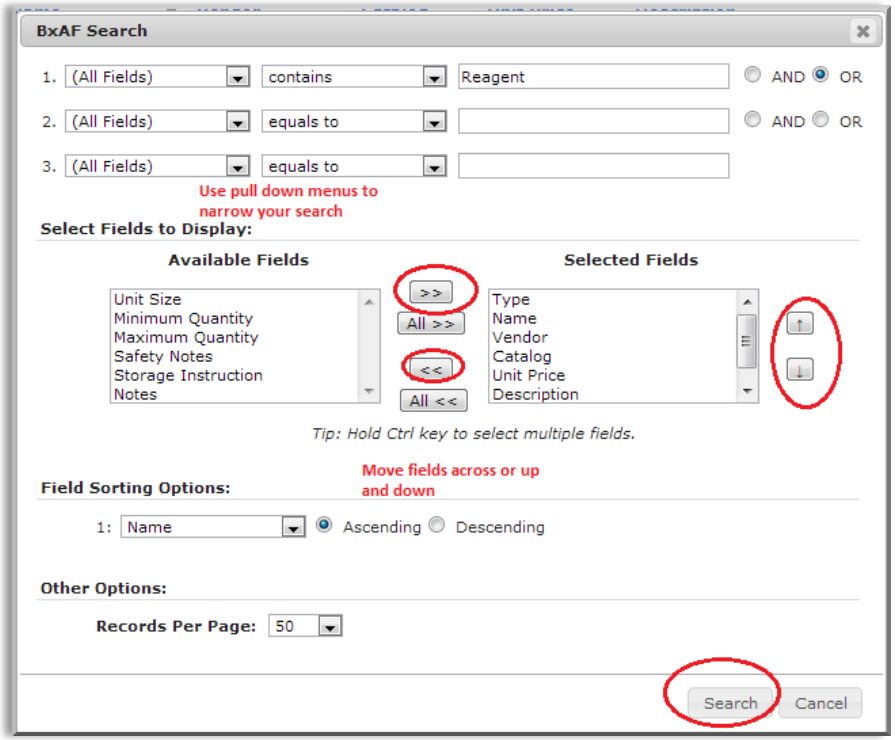
To perform a simple search, simply type in any search term in the search box and click **Search**.



No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	
2	Reagent	AscI	NEB	Cat#1	0		0	
3	Reagent	BamHI	NEB	Cat#4	0		0	
4	Reagent	BglII	NEB	Cat#5	0		0	
5	Reagent	ClaI	NEB	Cat#7	0		0	
6	Reagent	DpnI	NEB	Cat#8	0		0	
7	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents	0	
8	Reagent	EcoRI	NEB	R0101L	0		0	
9	Reagent	pBR322	Life Technologies	Plasmid01	0		0	
10	Reagent	pET21-a	Life Technologies	Plasmid02	0		0	
11	Reagent	pEXP5-CT	Life Technologies	Plasmid03	0		0	
12	Reagent	SacII	NEB	Cat#9	0		0	
13	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0	
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0	
15	Reagent	XmaI	NEB	Cat#10	0		0	

4.2.3.2: Advanced Search

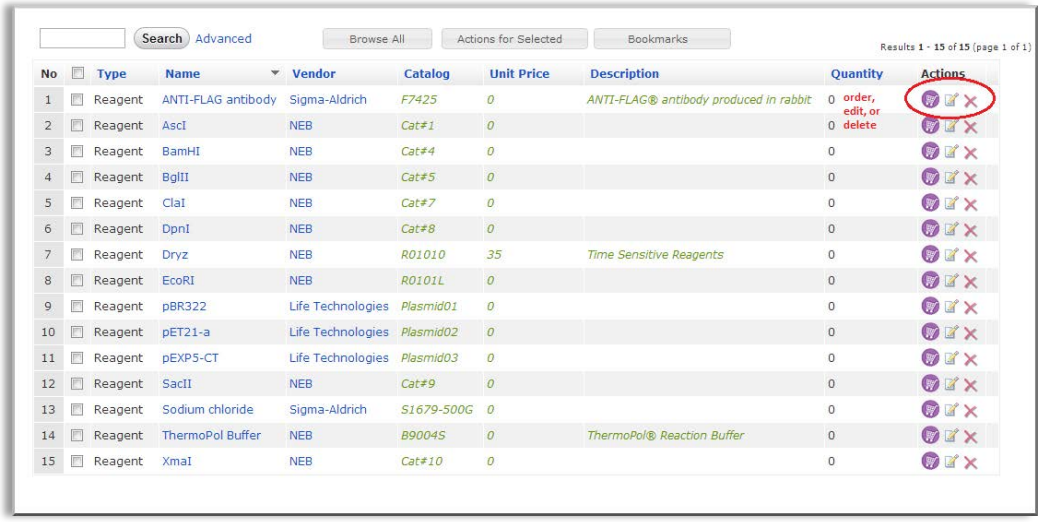
The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.



4.2.3.3: Edit Products

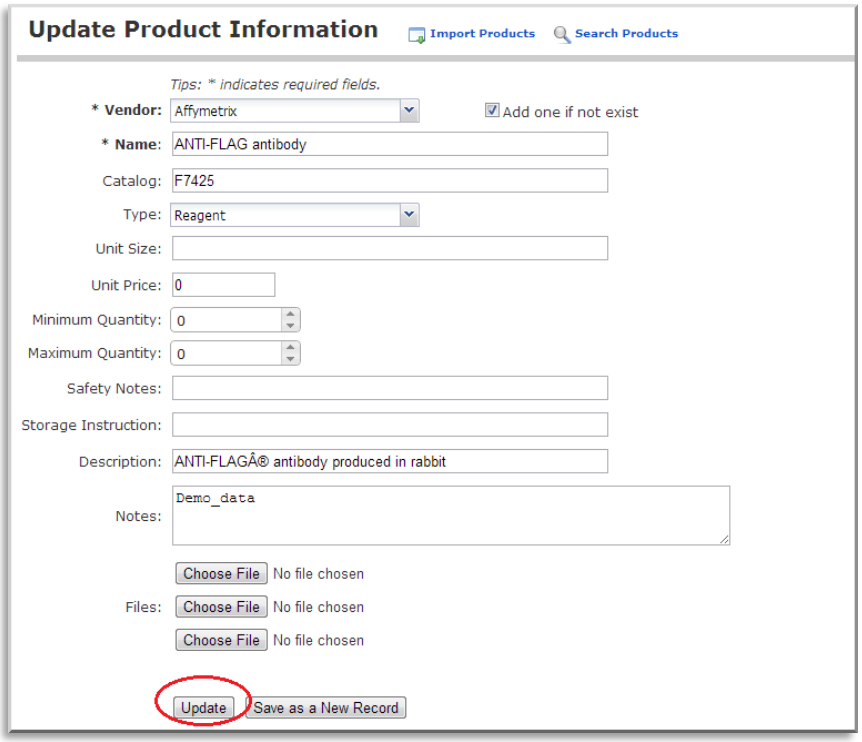
Vendor information may be updated at any time. From the **Search Products** Area, you may search a product or browse all and select from the list to update using the update icon. Products may also be deleted from this area.

**** Clicking the red X will delete the vendor*****



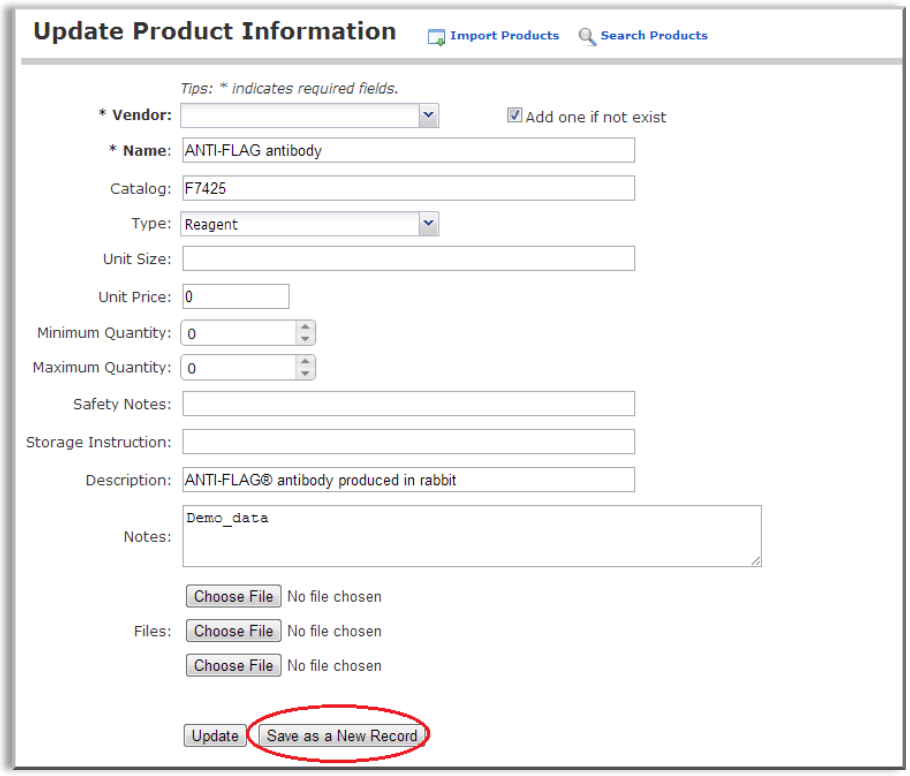
No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0
2	Reagent	AscI	NEB	Cat#1	0		0
3	Reagent	BamHI	NEB	Cat#4	0		0
4	Reagent	BglII	NEB	Cat#5	0		0
5	Reagent	ClaI	NEB	Cat#7	0		0
6	Reagent	DpnI	NEB	Cat#8	0		0
7	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents	0
8	Reagent	EcoRI	NEB	R0101L	0		0
9	Reagent	pBR322	Life Technologies	Plasmid01	0		0
10	Reagent	pET21-a	Life Technologies	Plasmid02	0		0
11	Reagent	pEXP5-CT	Life Technologies	Plasmid03	0		0
12	Reagent	SacII	NEB	Cat#9	0		0
13	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0
15	Reagent	XmaI	NEB	Cat#10	0		0

Click the pencil icon to edit the product and update.



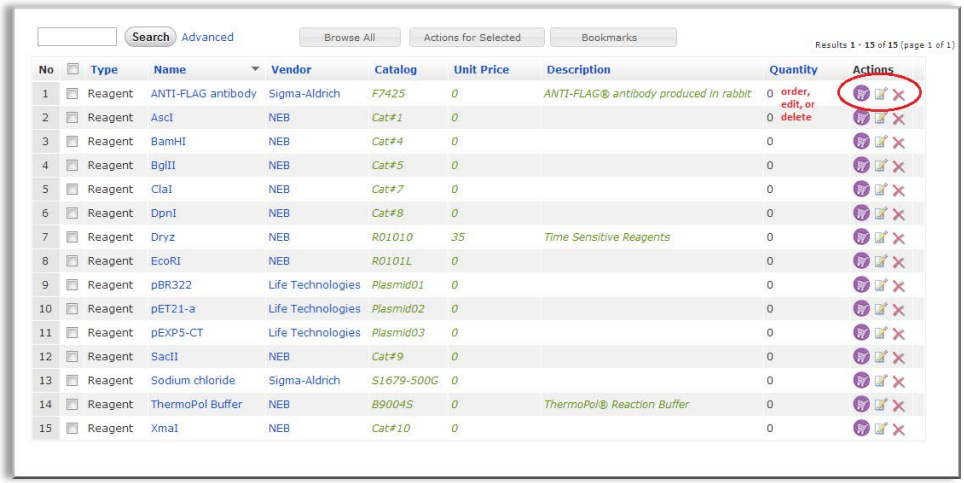
4.2.3.4: Create a New Product by Updating an Existing Similar Product

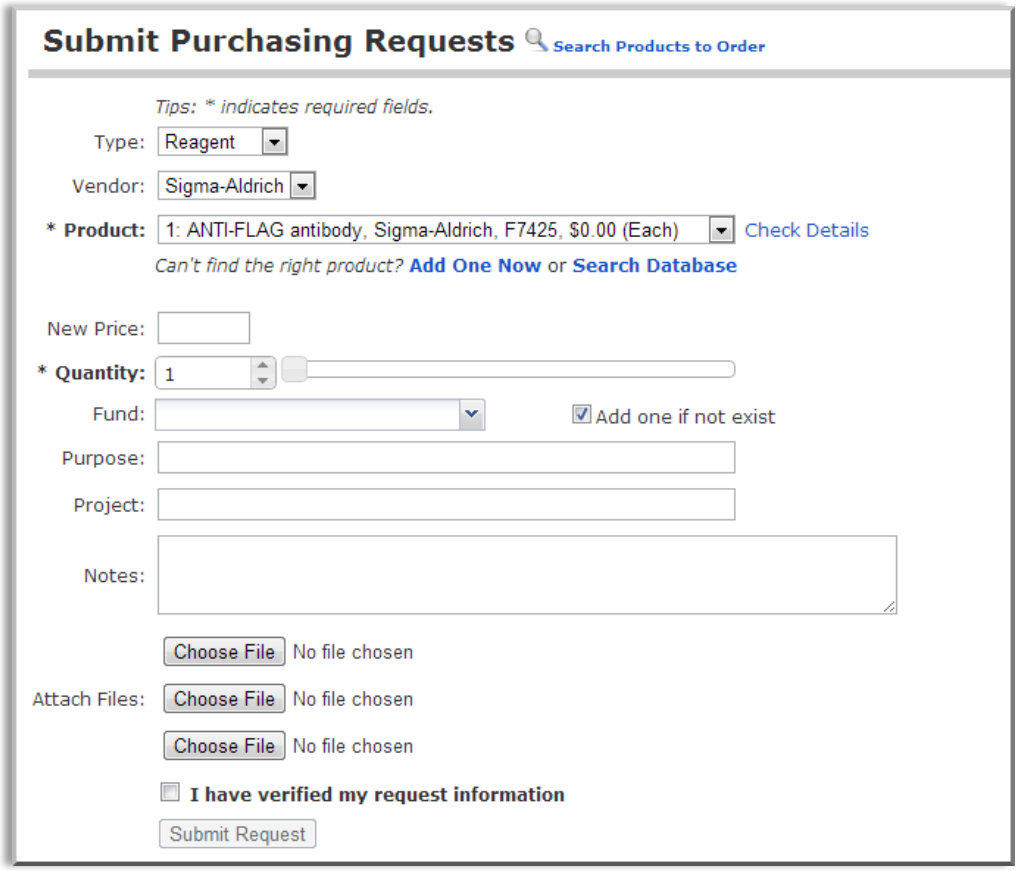
Quickly and easily create new products by updating an existing product with similar attributes. Save as a new record, and BxInventory will create a new product record while maintaining the existing record.



4.2.3.5: Order More Products

To order more existing products, use the **Search Products** tool to search for products to re-order. Click on the Shopping Cart icon to order.

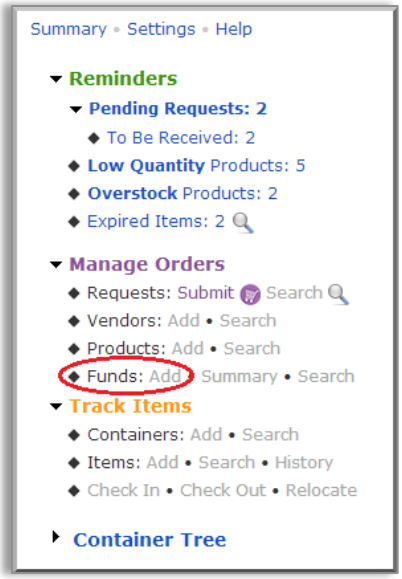



Submit Purchasing Requests
Search Products to Order
Tips: * indicates required fields.
Type:
Reagent
Vendor:
Sigma-Aldrich
* Product:
1: ANTI-FLAG antibody, Sigma-Aldrich, F7425, $0.00 (Each)
Check Details
Can't find the right product? Add One Now or Search Database
New Price:
* Quantity:
1
Fund:
Add one if not exist
Purpose:
Project:
Notes:
Choose File
No file chosen
Attach Files:
Choose File
No file chosen
Choose File
No file chosen
I have verified my request information
Submit Request

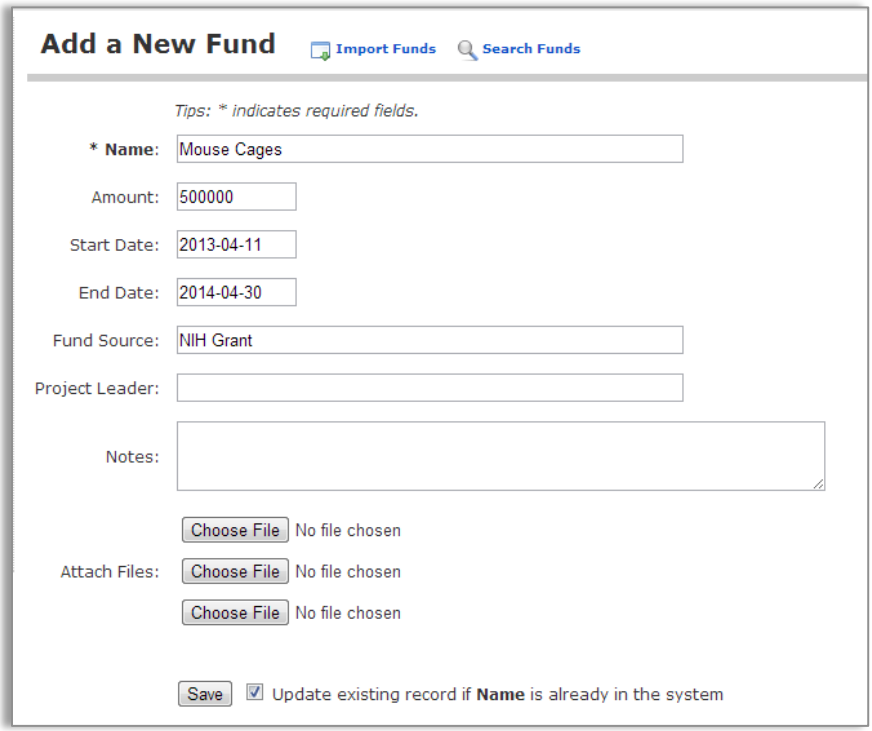
4.3: Funds

4.3.1: Add Funds

To add new funds, click the **Add Funds** link on the home page or in the sidebar menu.



Fill in required fields with *, all other fields are optional. You may also attach files related to the fund.



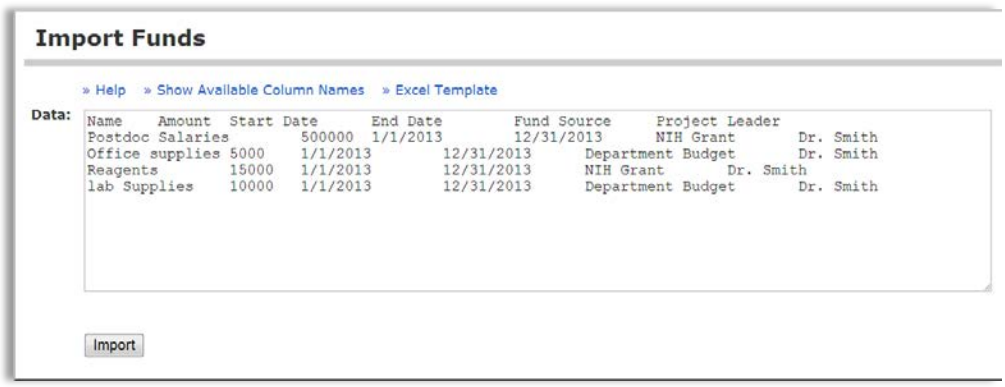
4.3.2: Import Funds

Step 1: From the **Add a New Fund** Page, select **Import Funds**.

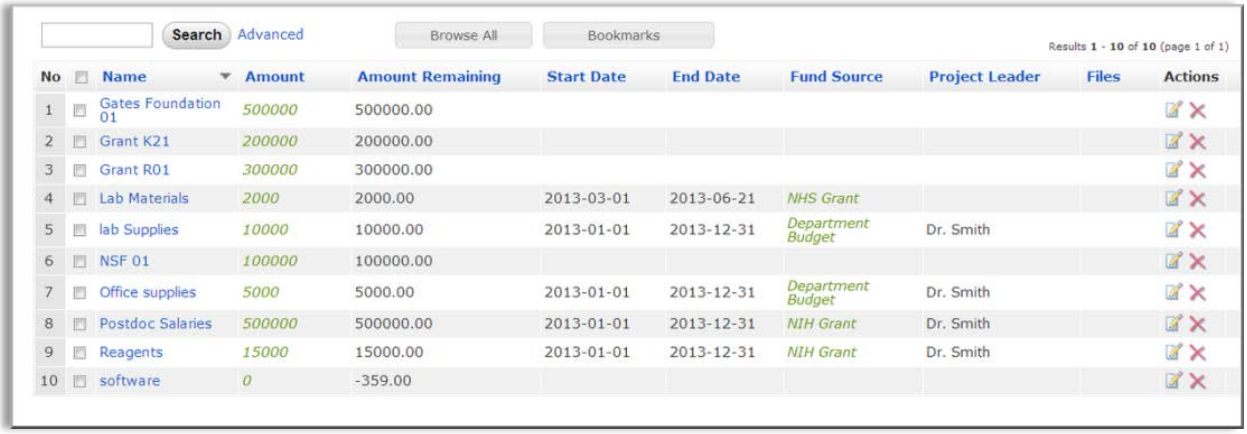
Step 2: Download the Excel Template to add your funds. If you have several fundsalready present in an Excel spreadsheet, you may copy and paste information into the template format. The only required field is the fund name; other fields may be deleted or left blank if not needed. Add as many funds to the spreadsheet as you wish. An example of the format is shown below.

A	B	C	D	E	F
Name	Amount	Start Date	End Date	Fund Source	Project Leader
Postdoc Salaries	500000	1/1/2013	12/31/2013	NIH Grant	Dr. Smith
Office supplies	5000	1/1/2013	12/31/2013	Department Budg	Dr. Smith
Reagents	15000	1/1/2013	12/31/2013	NIH Grant	Dr. Smith
lab Supplies	10000	1/1/2013	12/31/2013	Department Budg	Dr. Smith

Step 3: Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.



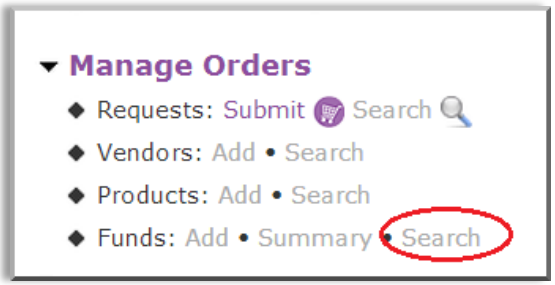
Step 4: Click Refresh when prompted and you will be directed to the funds list. Your new funds will appear in the list.



No	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader	Files	Actions
1	Gates Foundation 01	500000	500000.00						
2	Grant K21	200000	200000.00						
3	Grant R01	300000	300000.00						
4	Lab Materials	2000	2000.00	2013-03-01	2013-06-21	NHS Grant			
5	lab Supplies	10000	10000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
6	NSF 01	100000	100000.00						
7	Office supplies	5000	5000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
8	Postdoc Salaries	500000	500000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
9	Reagents	15000	15000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
10	software	0	-359.00						

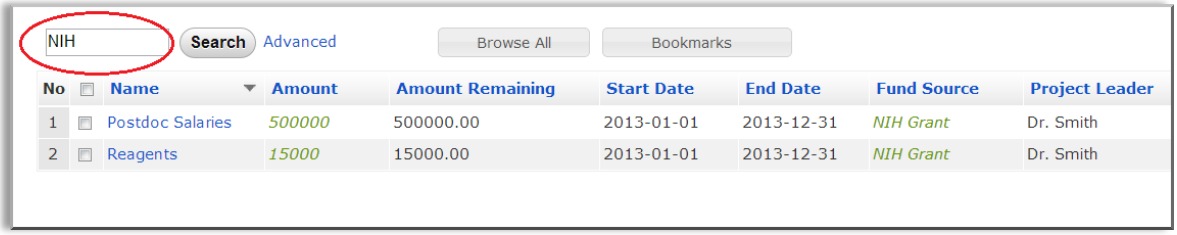
4.3.3: Search, Review, and Edit Funds

To search products, click **Funds: Search** under **Manage Orders** in the Left Sidebar.



4.3.3.1: Basic Search

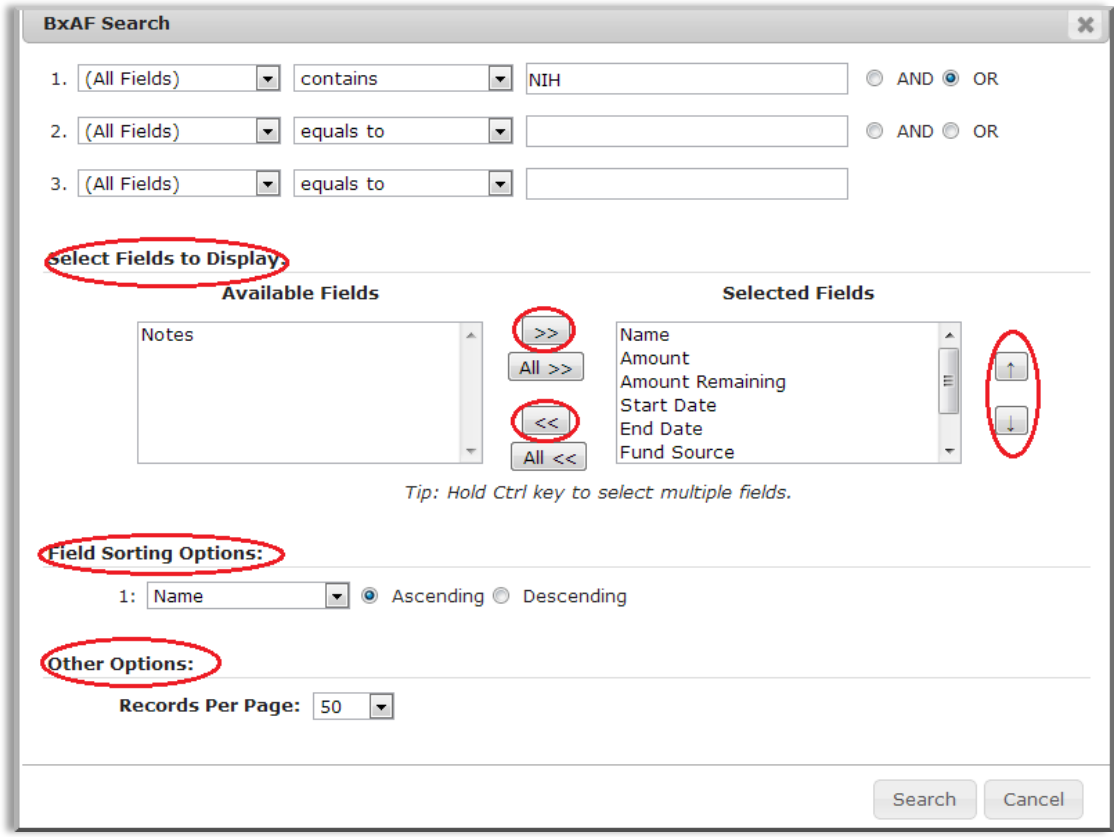
To perform a simple search, simply type in any search term in the search box and click **Search**.



No	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader
1	Postdoc Salaries	500000	500000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith
2	Reagents	15000	15000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith

4.3.3.2: Advanced Search

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.



4.3.3.3: Edit Funds

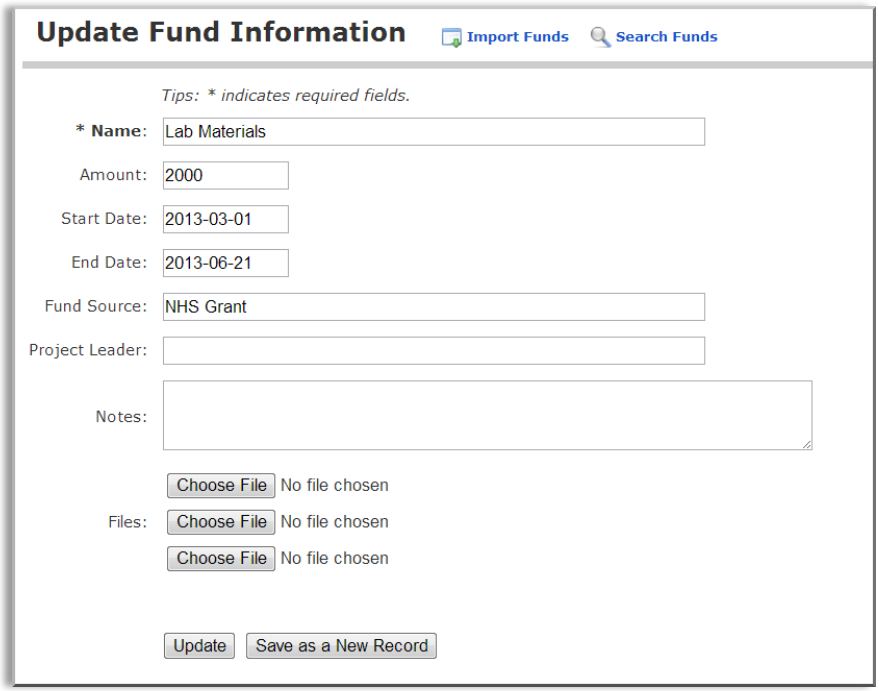
Fund information may be updated at any time. From the **Search Funds** Area, you may search a fund or browse all and select from the list to update using the update icon. Funds may also be deleted from this area.

**** Clicking the red X will delete the vendor*****

Click the pencil icon to edit the fund and update.

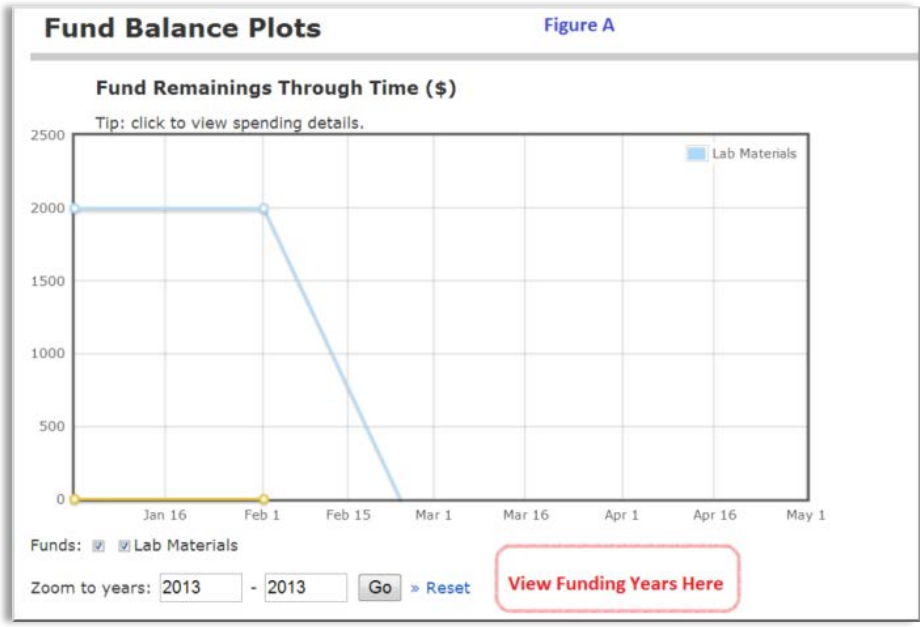
4.3.3.4: Create a New Fund by Updating an Existing Similar Fund

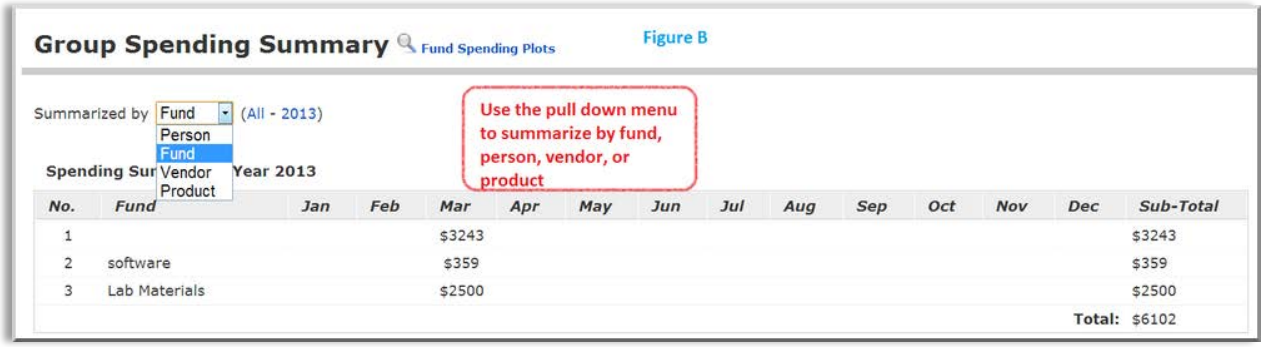
Quickly and easily create new funds by updating an existing product with similar attributes. Save as a new record, and BxInventory will create a new funding record while maintaining the existing record.



4.3.4: Funds Summary

The funds summary displays fund balance plots and group spending summaries. The group spending summary may be categorized by fund, person, vendor, or product.

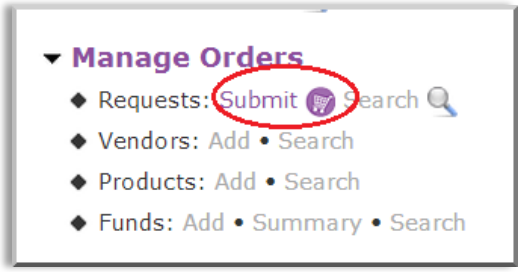




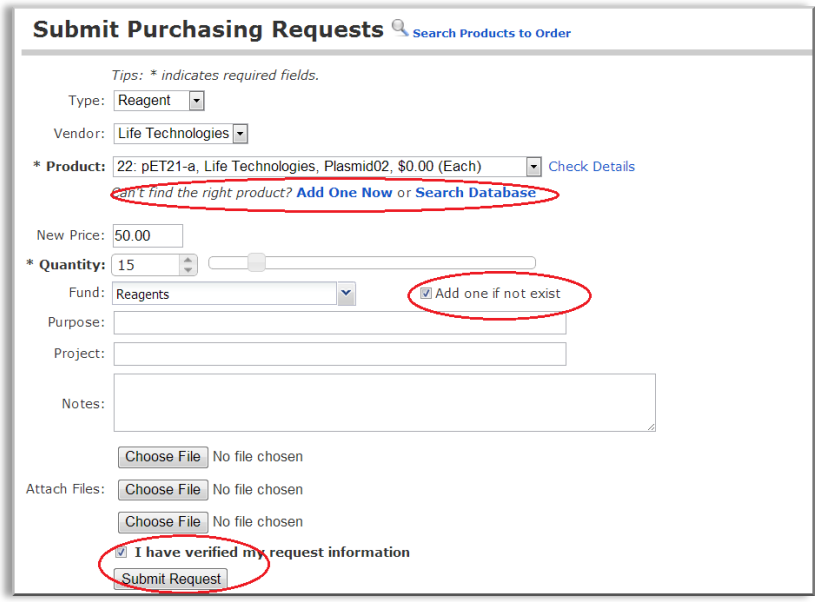
4.4: Purchase Requests

4.4.1: Submit Purchasing Requests

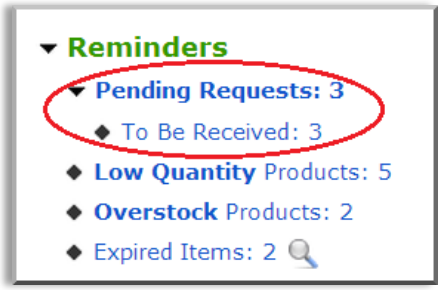
To place orders and submit purchasing requests, click the **Submit Purchase Requests** Link on the **Home Page** or in the sidebar menu.



Enter request information. Product name and quantity are required fields. If you select a fund, BxInventory will keep track of your budget for you. You may also add a fund here if needed.

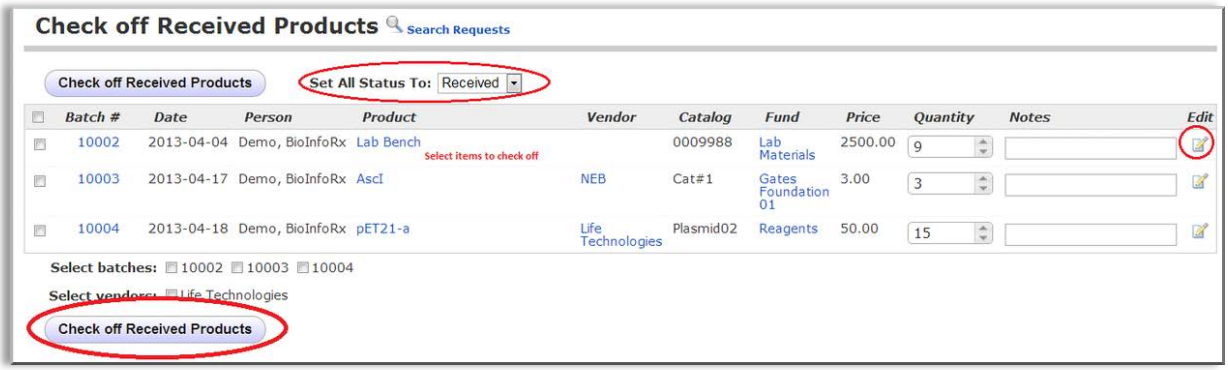


Verify your request information and submit request. Your request will appear in **Reminders: Pending Requests**in the left sidebar menu.



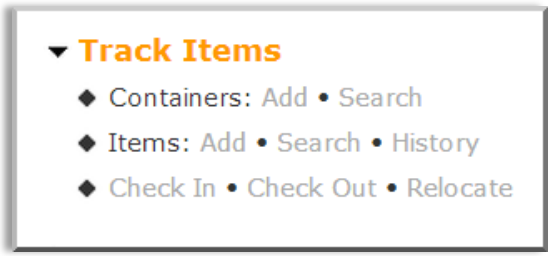
4.4.3: Process Order Requests

To process requests, check desired orders, select **To Be Received**. Set status to received, rejected, or cancelled (received products will automatically appear in your inventory in a container). Check off received products. Requests may also be edited in this area.



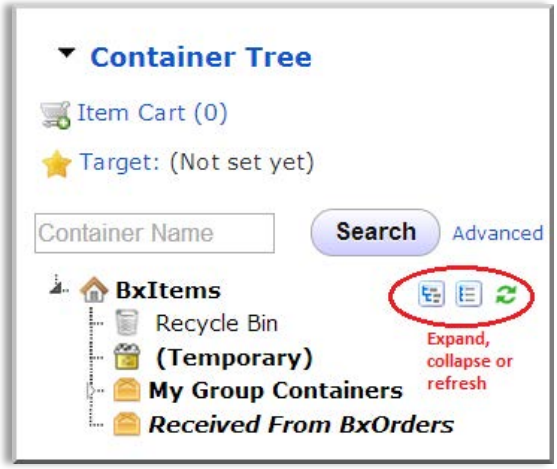
Section 5: Track Item Storage Information

To begin tracking inventory, use the **Track Item Storage** Information area from the Home page or the left sidebar menu.



5.1: Containers

The container tree, by default, will display a **Recycle Bin**(for deleted items), a **Temporary Container** (for unstored items), **My Group Containers** (top tier of the tree), and **Received From BxOrders** (products received).

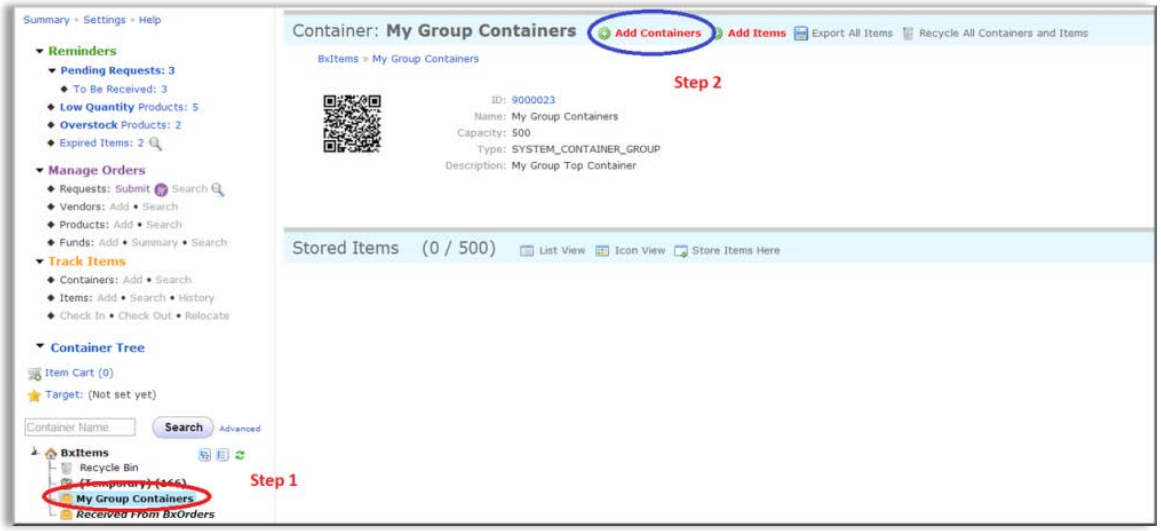


5.1.1: Add Containers

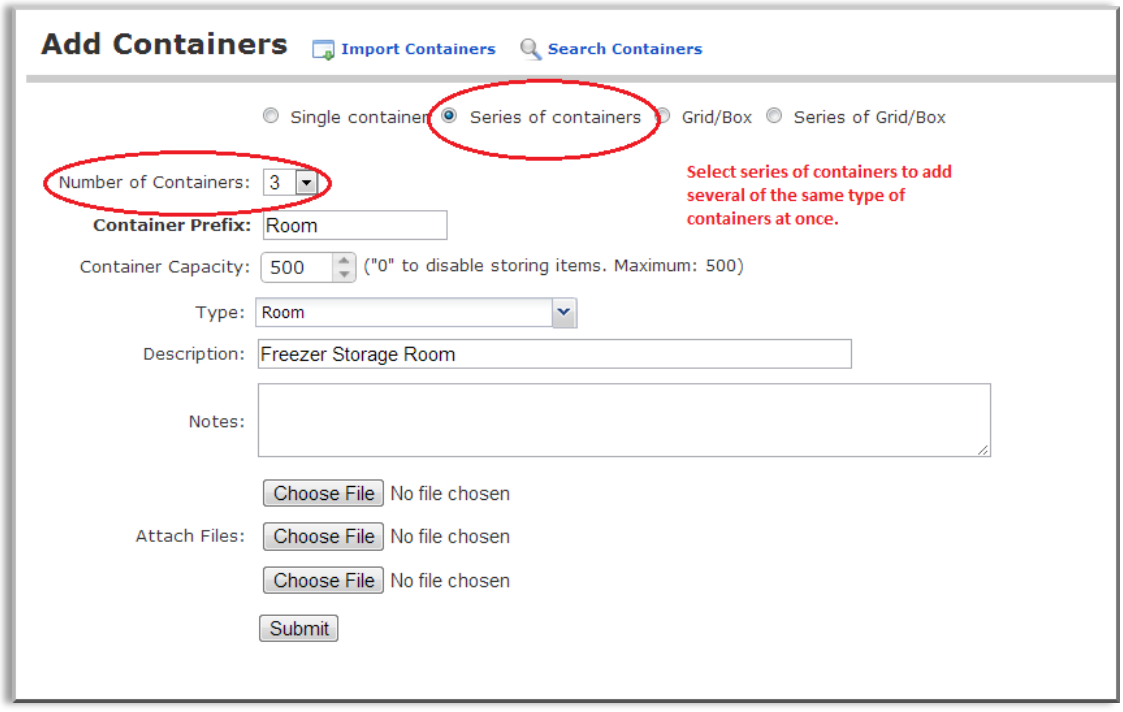
The container tree will display storage areas from largest to smallest. The example below demonstrates Room, Freezer, Shelf, Racks, and finally Boxes with grids for storage.

Tier 1: Rooms

Select **My Group Containers** for the highest level and click **Add Containers**.

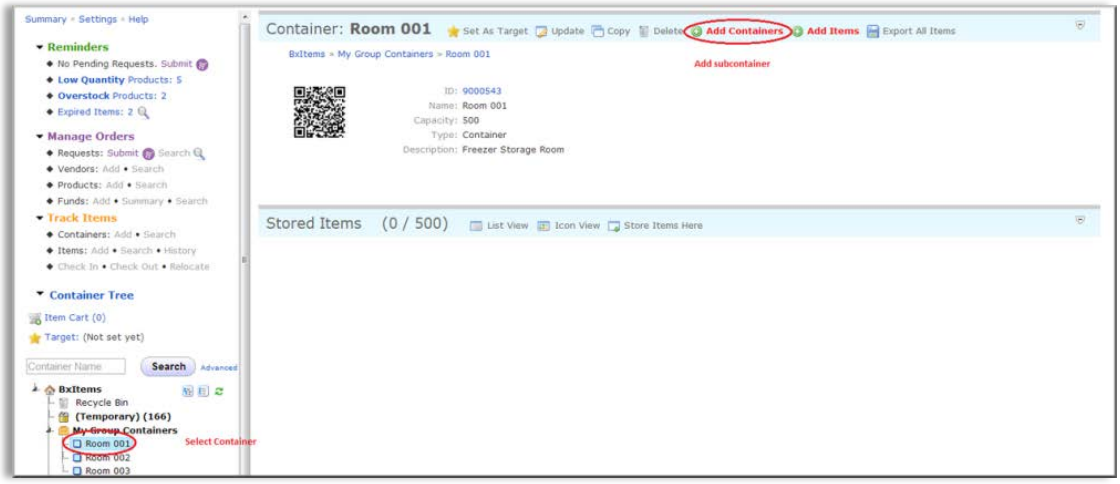


Fill in container information and submit. You may add one room, or a series of rooms. You may attach files to all containers. Photos will appear in your container summary.

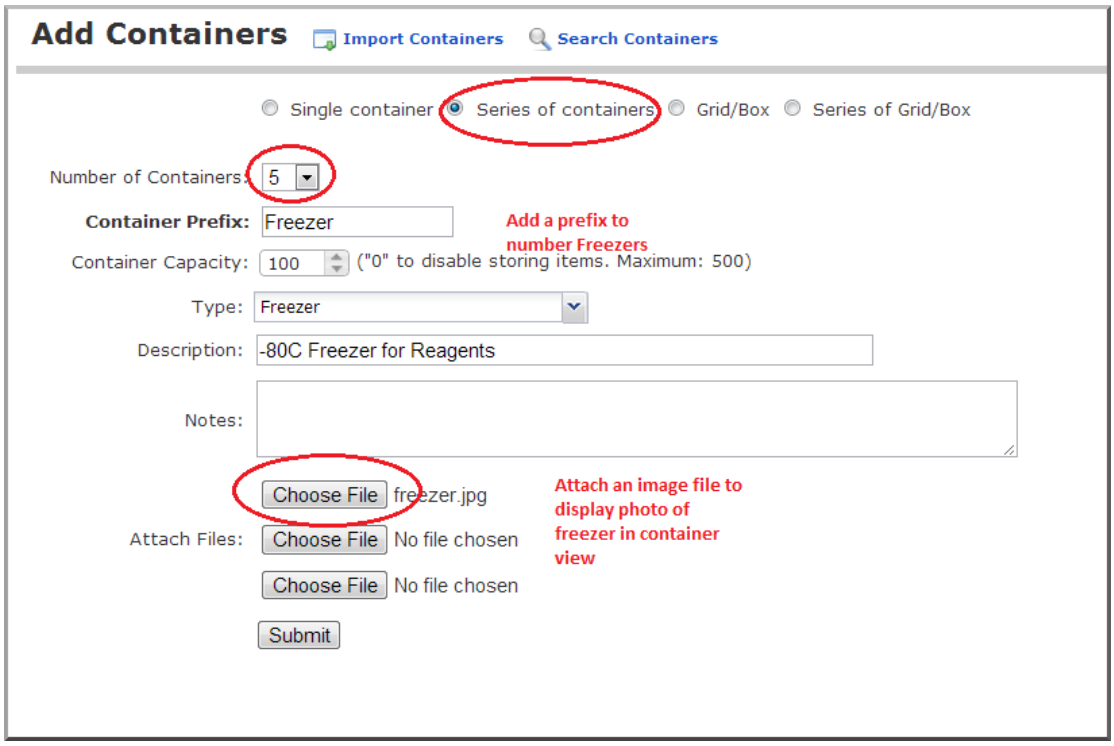


Tier 2: Freezers in a Room

From the container tree, select the room to add freezers to, and click **Add Containers**.

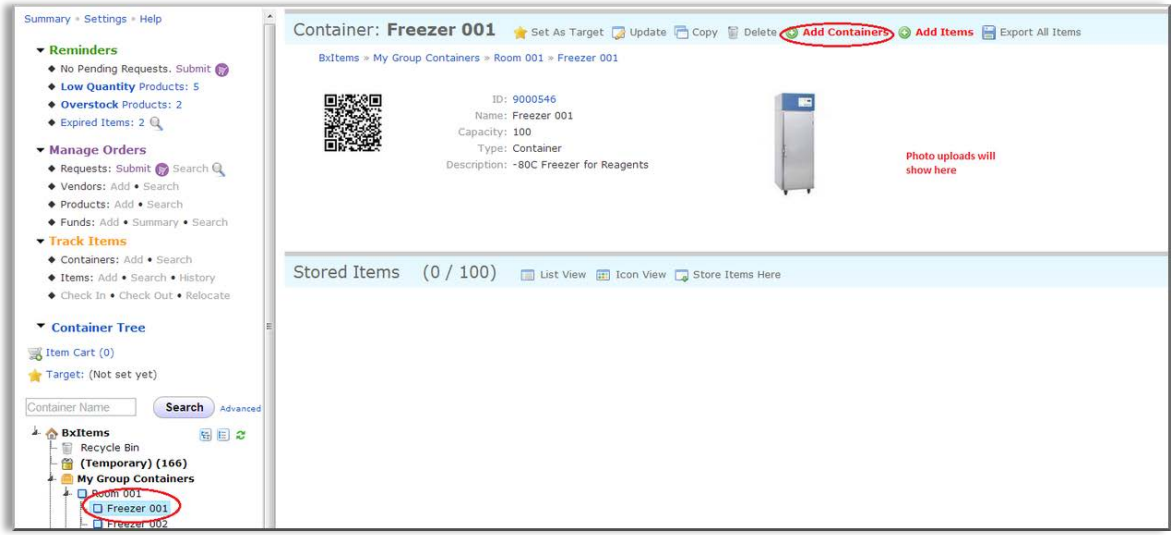


Fill in container information. You may add one freezer, or a series of freezers.Attach an image file if desired.

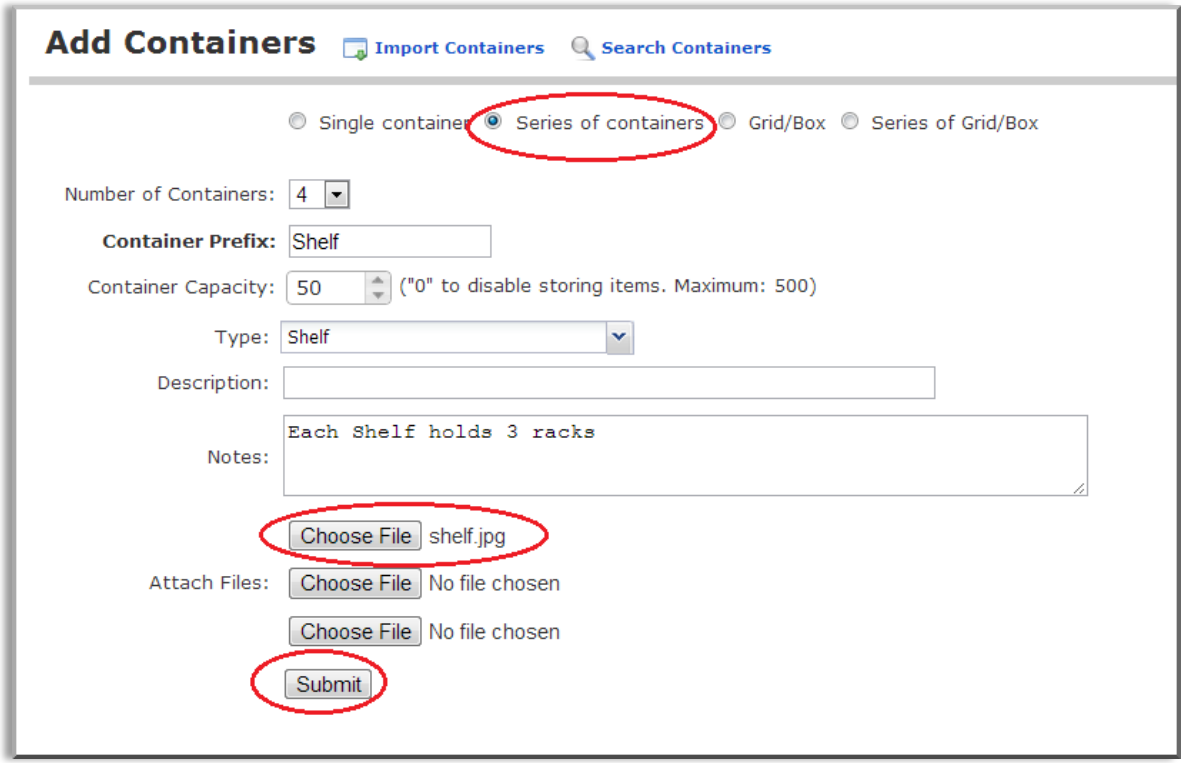


Tier 3: Shelves in the Freezer

Select the freezer to add shelves to, and click **Add Containers**.

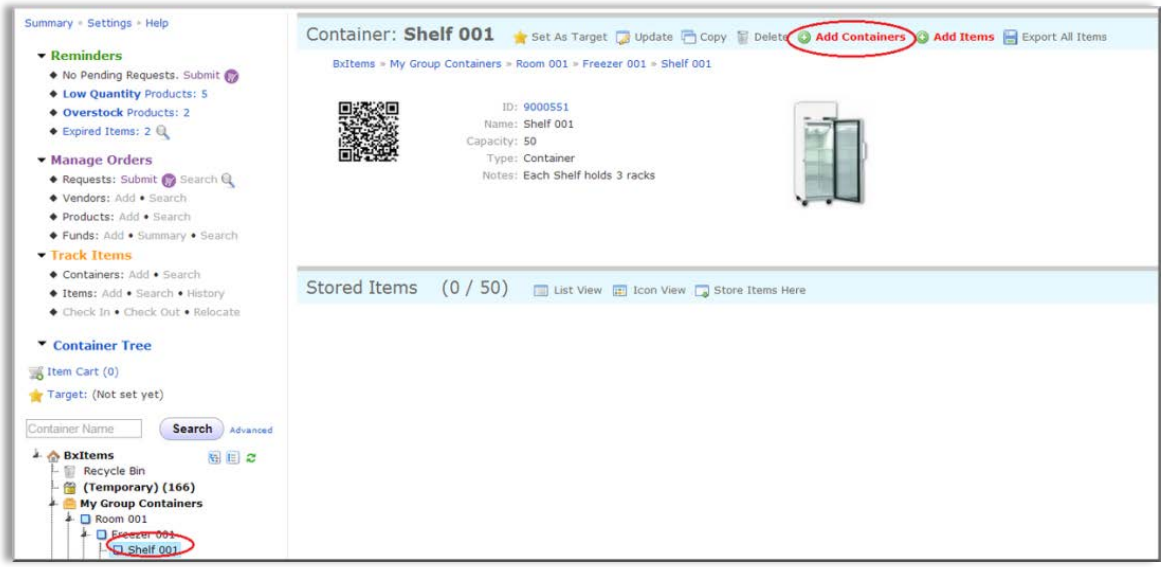


Fill in container information. You may add one shelf, or a series of shelves.

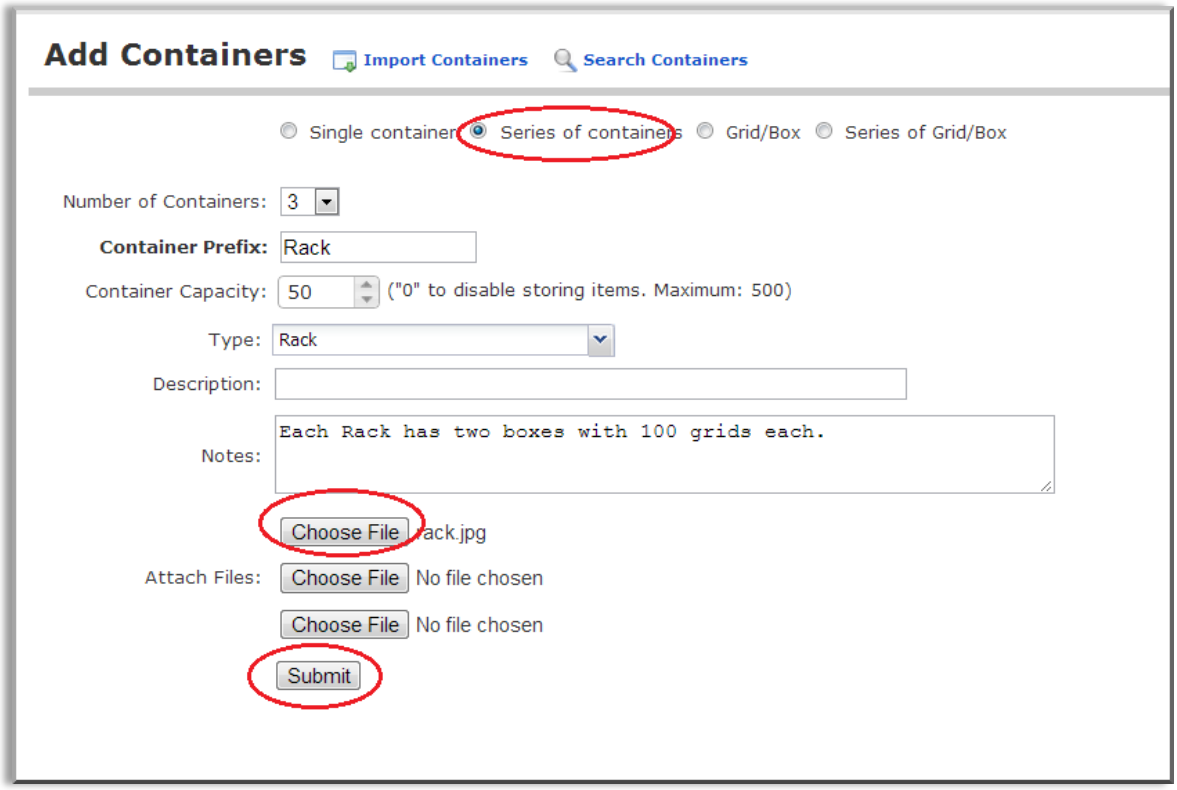


Tier 4: Racks on a Shelf

Click on the shelf you would like to add racksto, and select **Add Containers**.

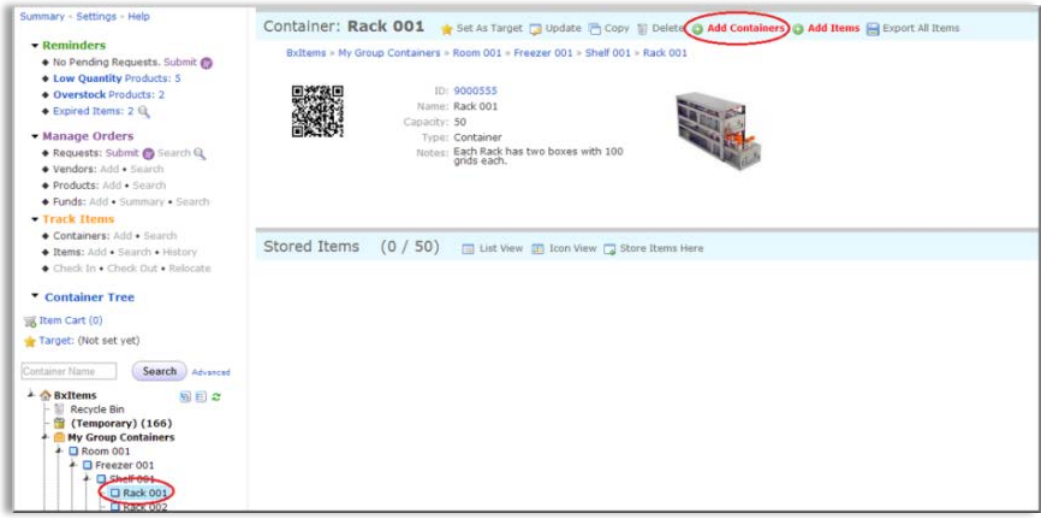


Fill in container information. You may add one rack, or a series of racks. Upload a file if desired.

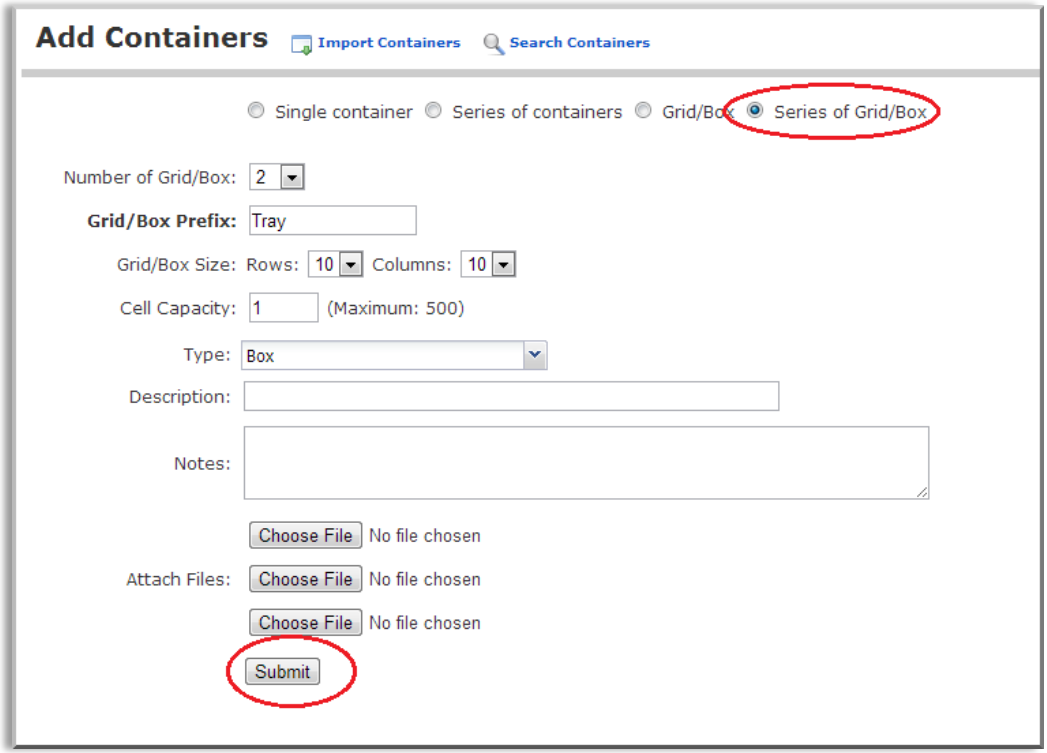


Tier 5: Trays in the Rack

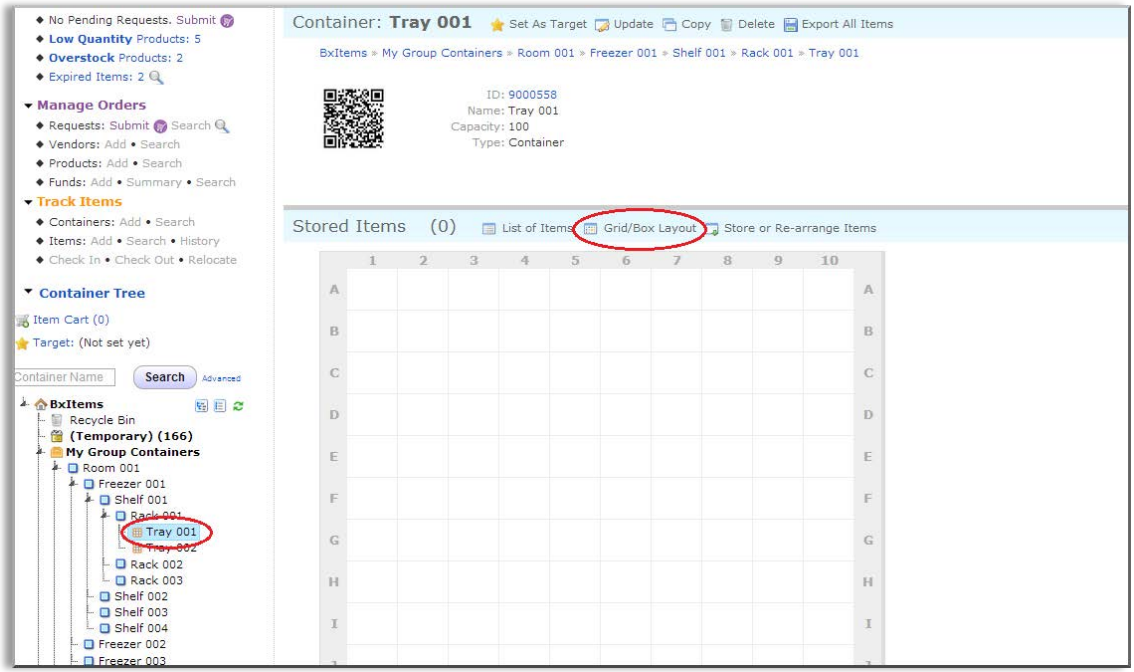
Click on the rack you would like to add boxes/trays to, and select **Add Containers**.



If your box/tray has storage grids, choose **Grid/Box** or **Series of Grid/Box**. This is where your items will be stored. Specify the number of grids in your box/tray, enter a prefix, and the capacity of each grid/cell.

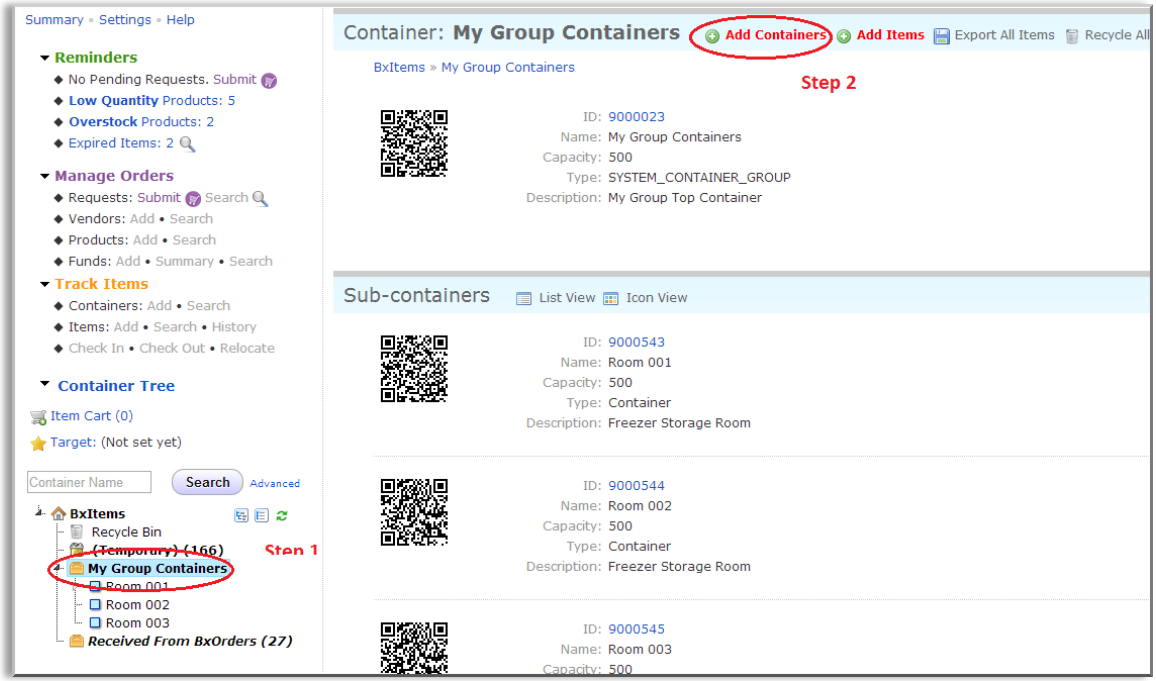


To view the grids in your tray/box, select the box in the container tree or the container list and choose **Grid/Box Layout**.



5.1.2: Import Containers

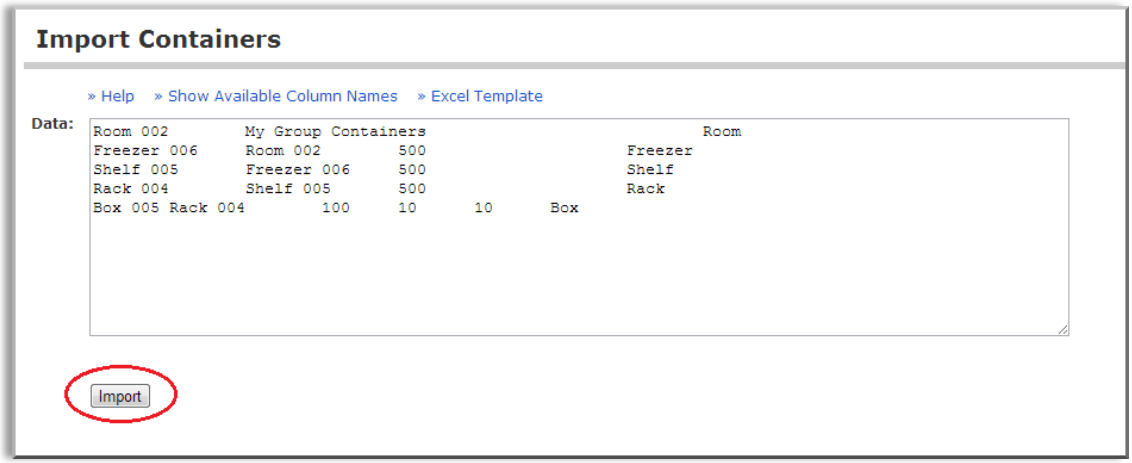
To set up containers from an import, select **My Group Containers – Add Containers – Import Containers. It is highly recommended to plan out your containers in a map before adding containers with the import tool.**



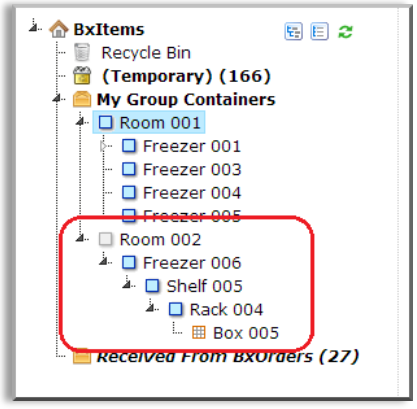
Step 1: Download the Excel Template, and enter your container information as shown in the example. Name the Parent Container for each new container. If it has grids, add number of rows and columns. **Your container names must be unique from those already in the system.**

A	B	C	D	E	F	G	H
Name	Parent	Capacity	Rows	Cols	Type	Description	Notes
Room 002	My Group Containers				Room		
Freezer 006	Room 002	500			Freezer		
Shelf 005	Freezer 006	500			Shelf		
Rack 004	Shelf 005	500			Rack		
Box 005	Rack 004	100	10	10	Box		

Step 2: Copy all headers and cells and paste into the import box, and submit.

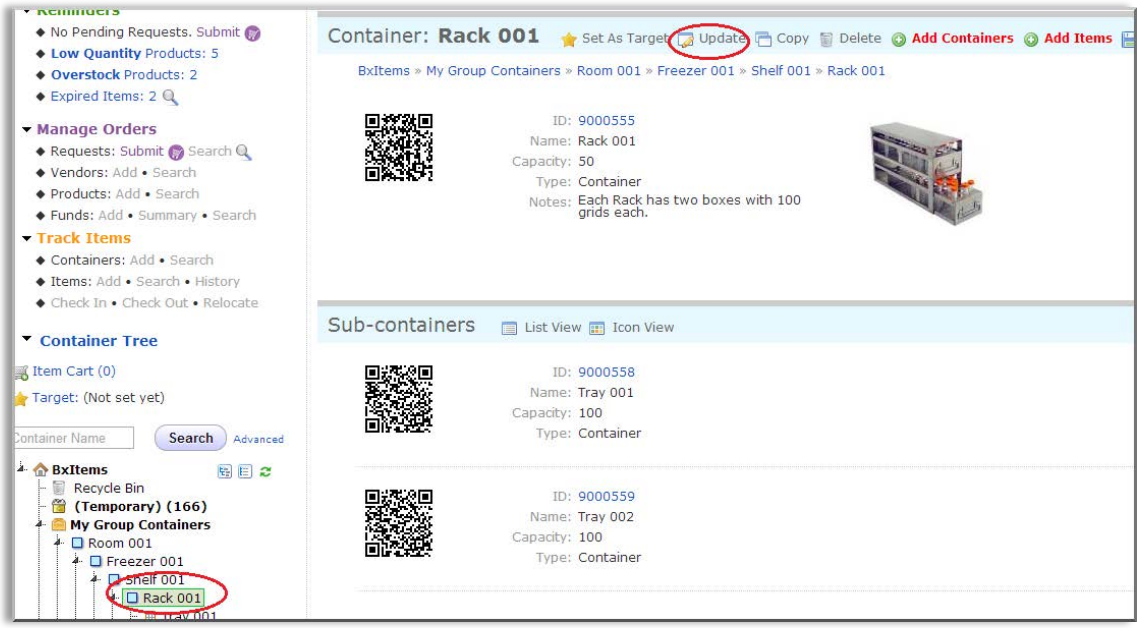


Your containers will import to the container tree, if listed properly.

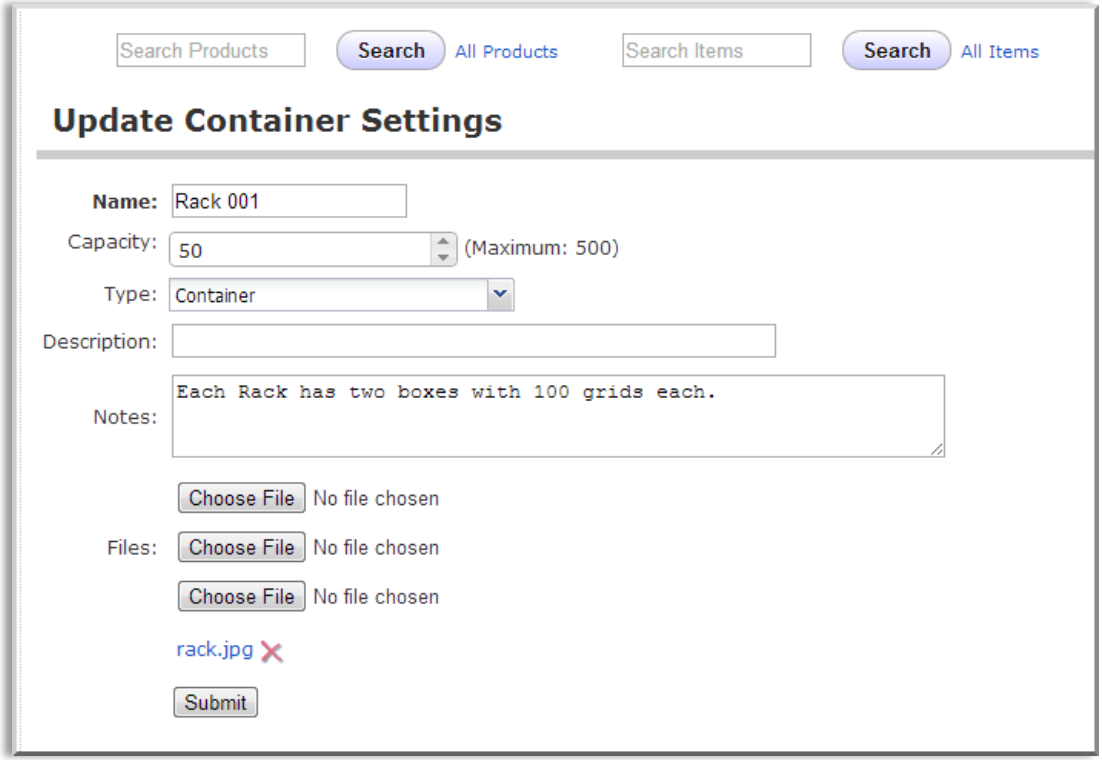


5.1.3: Edit Containers

You may edit containers at any time by selecting the container and clicking on the update button.



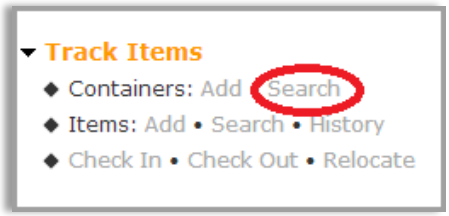
Update any necessary information (name of shelf, number of items allowed on shelf, grid size, photo, etc.)



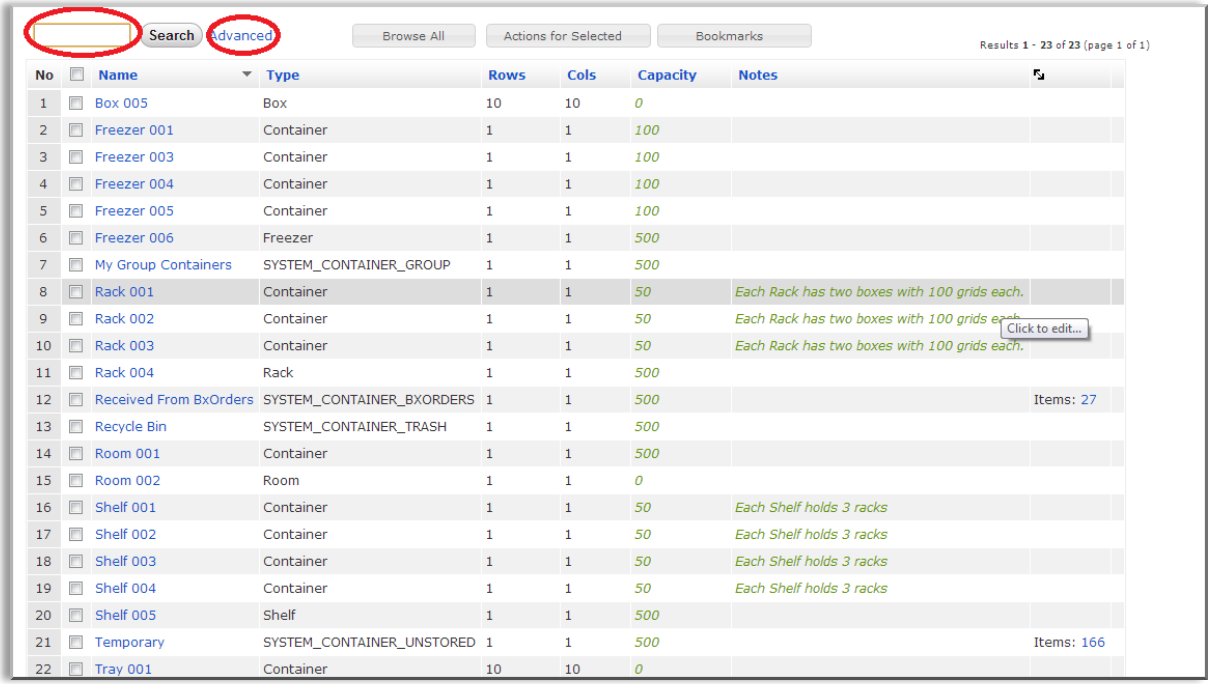
Resizing a grid will result in all items being moved to the temporary container.

5.1.4: Search Containers

To search for containers, click **Containers: Search** in the left sidebar menu.

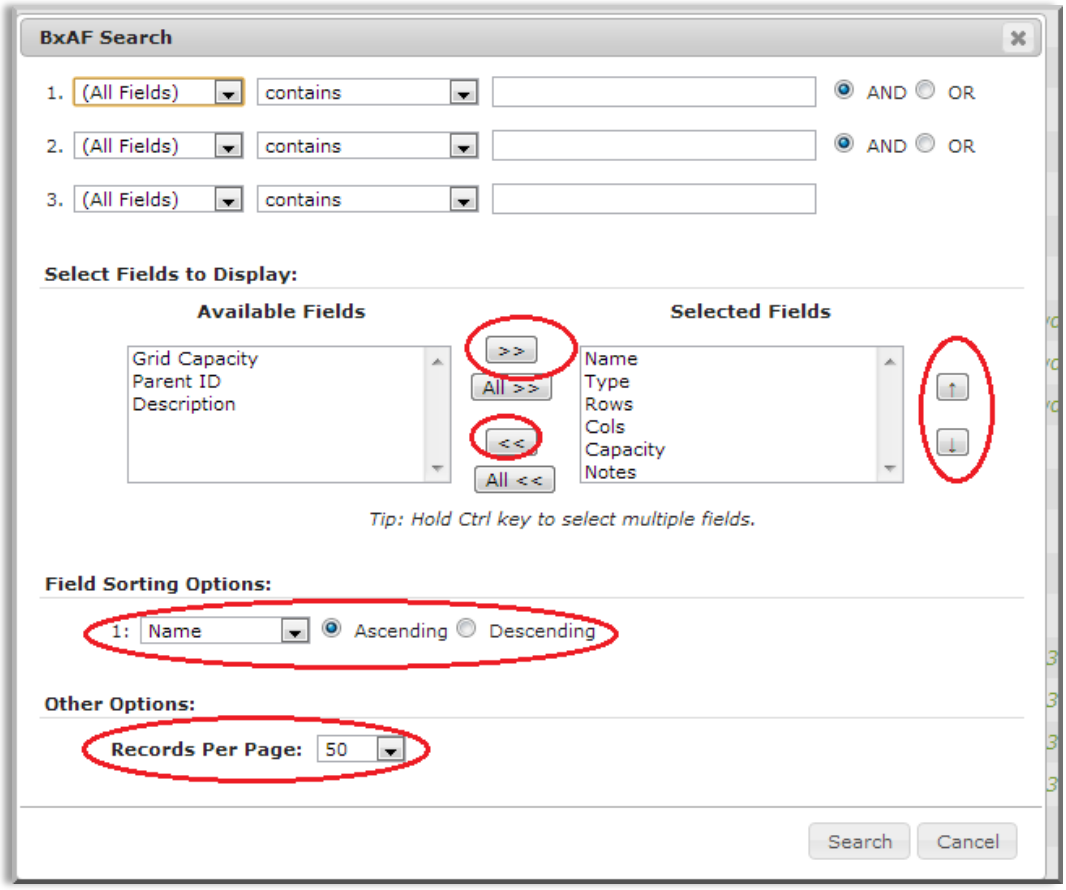


Type a simple search term for a quick search, or click the advanced button for a more detailed search and to change settings.



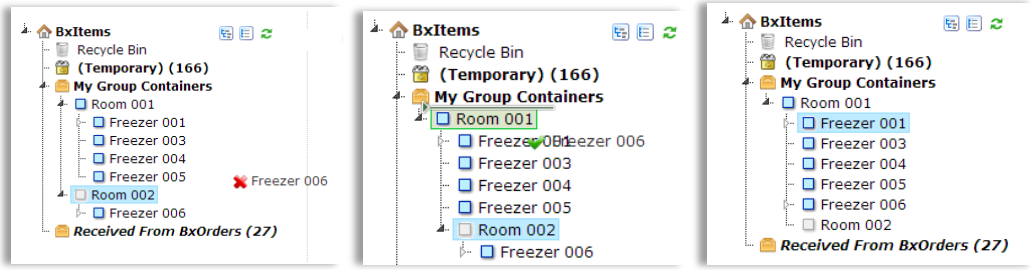
No	Name	Type	Rows	Cols	Capacity	Notes	
1	Box 005	Box	10	10	0		
2	Freezer 001	Container	1	1	100		
3	Freezer 003	Container	1	1	100		
4	Freezer 004	Container	1	1	100		
5	Freezer 005	Container	1	1	100		
6	Freezer 006	Freezer	1	1	500		
7	My Group Containers	SYSTEM_CONTAINER_GROUP	1	1	500		
8	Rack 001	Container	1	1	50	Each Rack has two boxes with 100 grids each.	
9	Rack 002	Container	1	1	50	Each Rack has two boxes with 100 grids each.	
10	Rack 003	Container	1	1	50	Each Rack has two boxes with 100 grids each.	
11	Rack 004	Rack	1	1	500		
12	Received From BxOrders	SYSTEM_CONTAINER_BXORDERS	1	1	500		Items: 27
13	Recycle Bin	SYSTEM_CONTAINER_TRASH	1	1	500		
14	Room 001	Container	1	1	500		
15	Room 002	Room	1	1	0		
16	Shelf 001	Container	1	1	50	Each Shelf holds 3 racks	
17	Shelf 002	Container	1	1	50	Each Shelf holds 3 racks	
18	Shelf 003	Container	1	1	50	Each Shelf holds 3 racks	
19	Shelf 004	Container	1	1	50	Each Shelf holds 3 racks	
20	Shelf 005	Shelf	1	1	500		
21	Temporary	SYSTEM_CONTAINER_UNSTORED	1	1	500		Items: 166
22	Tray 001	Container	10	10	0		

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.



5.1.5: Relocating Containers

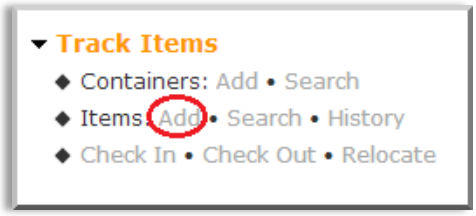
Containers can be moved easily in the tree view by using drag and drop. Open your tree and select a container to move with your mouse, and drag it into the desired location. When you begin dragging your item, it will have a small red X. When your mouse reaches the desired location, you will see a green checkmark, and the item can be dropped.



5.2: Items

5.2.1: Add Items without Ordering

When you order and receive items, they are automatically added to your inventory in the **Received From BxOrders** container. To add new items to your inventory without using the ordering function, use the **Add Items** function from the **Home Screen** or left sidebar menu.

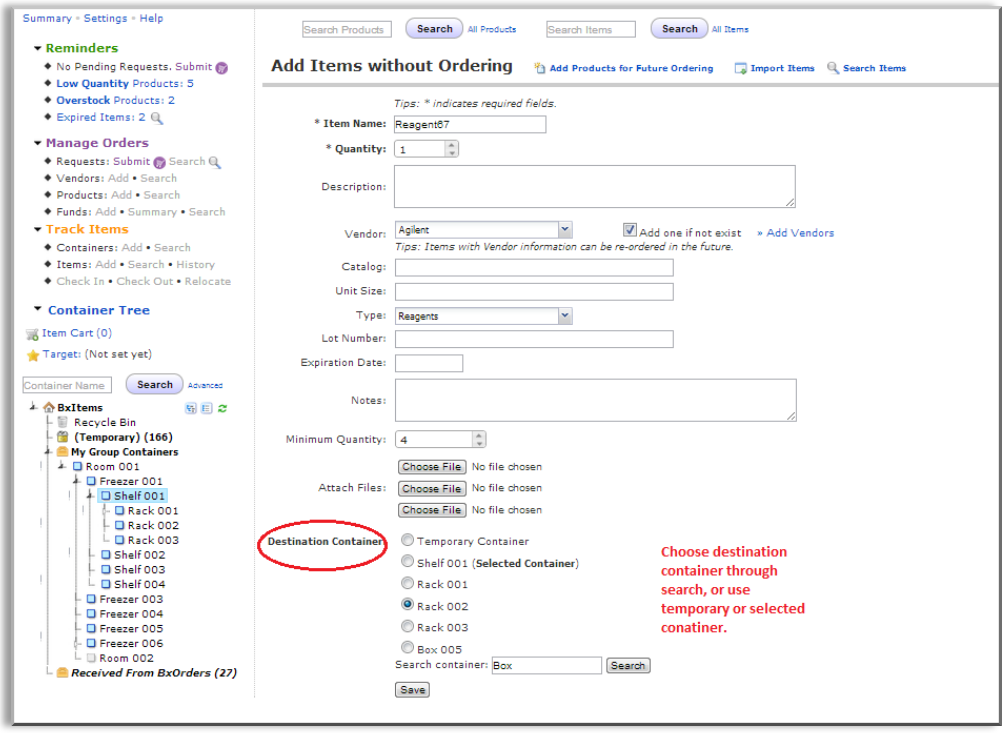


Item Name and Quantity are required fields. If you do not add a barcode, the system will generate one automatically.

If you would like to add products for future ordering, use the link at the top of the page.

You may attach up to 3 files such as documents or photos to your items.

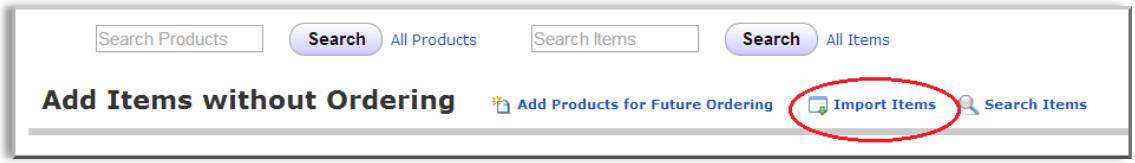
Choose a Destination Container: Select a container before adding items, or search for the container within the Add items tool. You can add items to your temporary (unstored) container to store later, or add directly to a container you have set up.



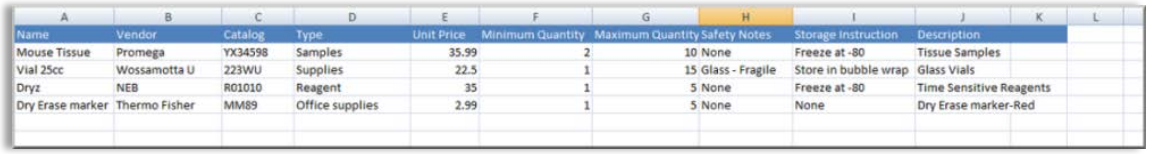
5.2.2: Import Items

Items may also be imported from Excel. Use the Import tool to import new items.

Step 1: From the Add Items Page, select **Import Items**.

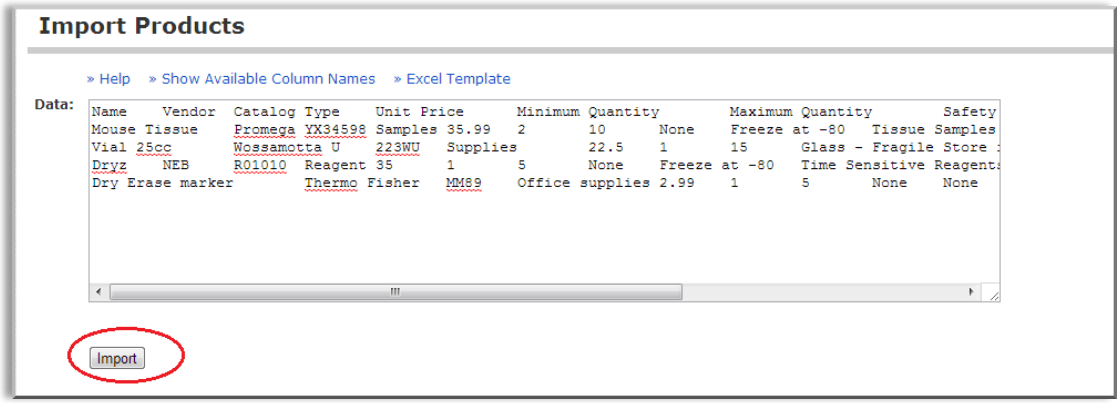


Step 2: Download the Excel Template to add your items. If you have several items already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required fields are vendor name and product name; other fields may be deleted or left blank if not needed. Add as many products to the spreadsheet as you wish. An example of the format is shown below.



Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety Notes	Storage Instruction	Description
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None	Freeze at -80	Tissue Samples
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile	Store in bubble wrap	Glass Vials
Dryz	NEB	R01010	Reagent	35	1	5	None	Freeze at -80	Time Sensitive Reagents
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None	None	Dry Erase marker-Red

Step 3: Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.



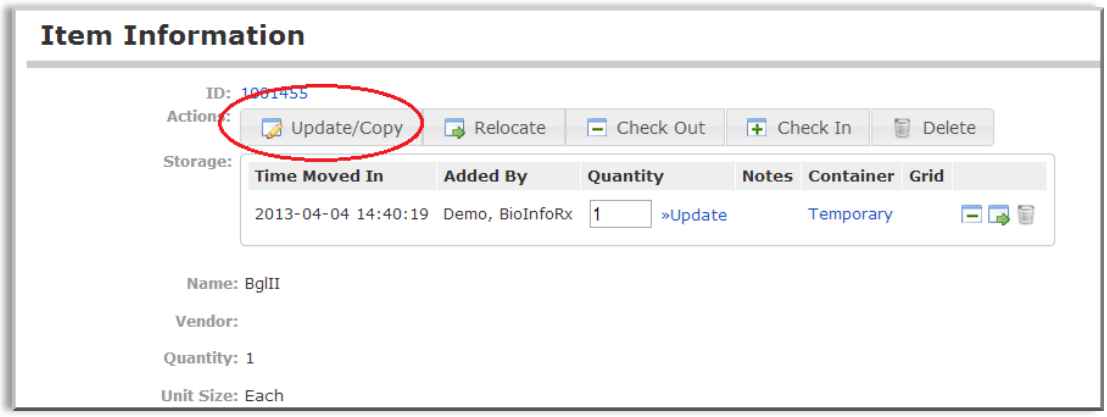
Step 4: Click Refresh when prompted and you will be directed to the Product/Item list. Your new products will appear in the list.

No	Type	Name	Vendor	Catalog	Unit Price	Description
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit
2	Reagent	AscI	NEB	Cat#1	0	
3	Reagent	BamHI	NEB	Cat#4	0	
4	Reagent	BglII	NEB	Cat#5	0	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers
6	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System
7	software	BxItems			359	
8	Lab Equipment	Centrifuge	VWR	E002	0	
9	Reagent	ClaI	NEB	Cat#7	0	
10	Office Supplies	Copy Paper	Thermo Fisher	V012	0	
11	Reagent	DpnI	NEB	Cat#8	0	
12	Office supplies	Dry Erase marker	Thermo Fisher	MM89	2	Dry Erase marker-Red
13	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents
14	Reagent	EcoRI	NEB	R0101L	0	
15	Office Supplies	Folders	Thermo Fisher	V001	0	
16	Equipment	Lab Bench	Neoclone	0009988	2500	
17	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Glove
18	Lab Equipment	Microscope	VWR	E001	0	
19	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System
20	Samples	Mouse Tissue	Promega	YX34598	35	Tissue Samples
21	Reagent	pBR322	Life Technologies	Plasmid01	0	

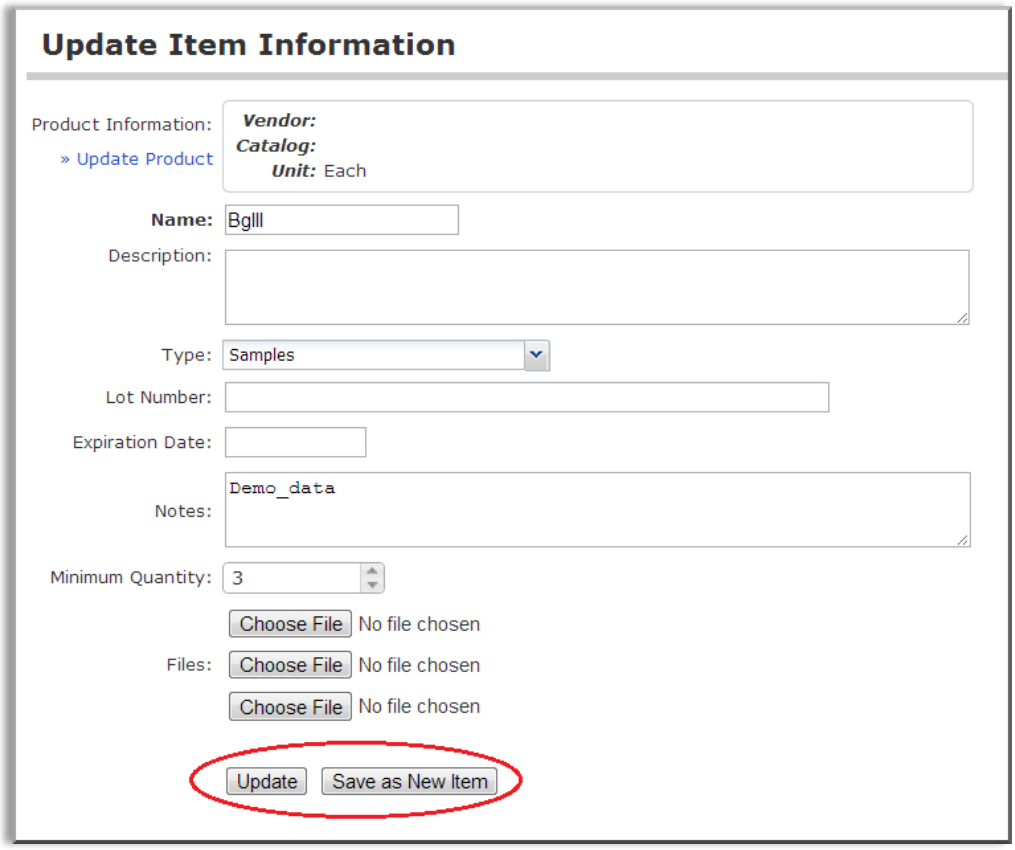
5.2.3: Update and Copy Items

You can update existing items or add new items that are similar to already added items by using the **Update or Copy Items** function. Any item can be updated or saved as a new item.

Navigate to the item you would like to update, and select **Update/Copy**.



Enter your new information. To update an existing item, select **Update**, or you can save it as a new item.



Section 6: Managing Inventory Items

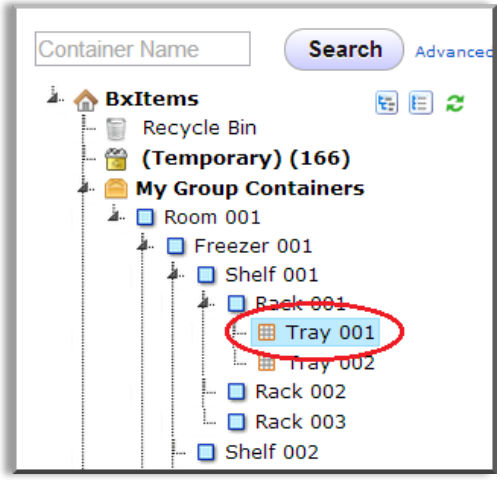
6.1: Store Items in a Container

6.1.1: Store Temporary Items

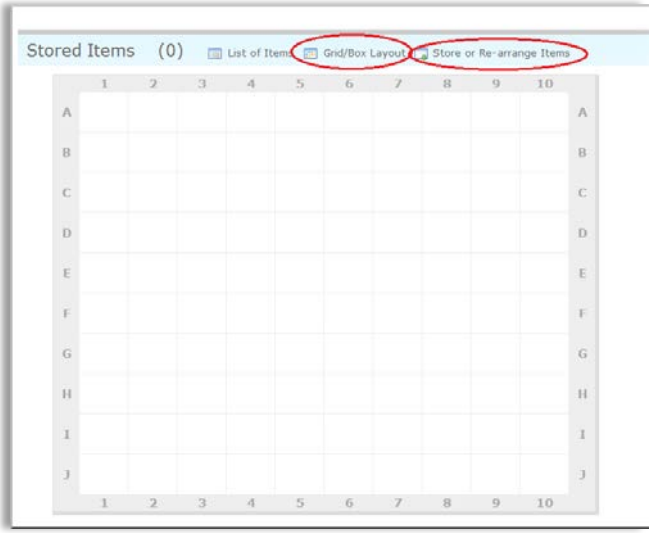
You can store your items located in the **Temporary** container by selecting the container to store items to, and choose **Store or rearrange items**.
Drag and drop items into your container, or choose **Auto allocate** to automatically store all items.

In this example, we will store items from the temporary container into Room 001 – Freezer 001 – Shelf 001 – Rack001- Tray001.

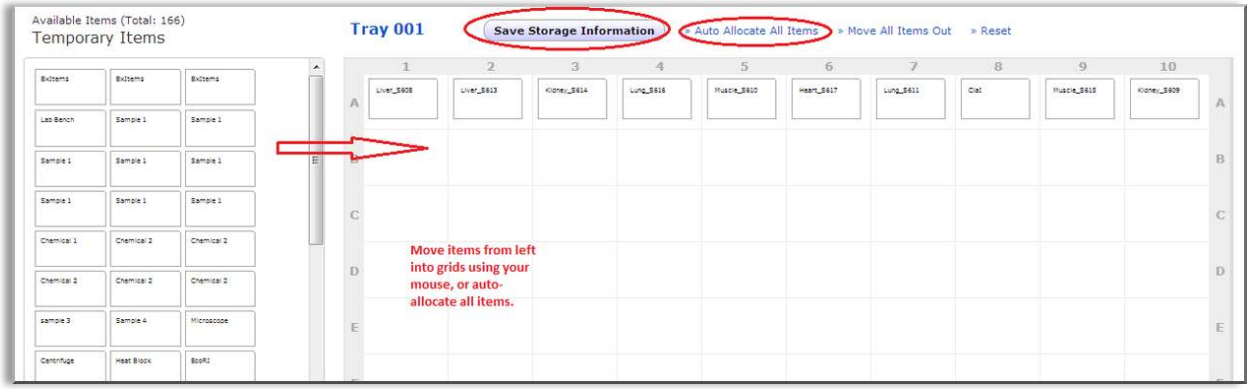
Step 1: Navigate to the container in which you wish to store items from the container tree.



Step 2: Select **Grid/Box Layout** , then **Store or Re-Arrange Items.**



Step 3: Drag and Drop Items or auto-allocate. Be sure to save storage information.



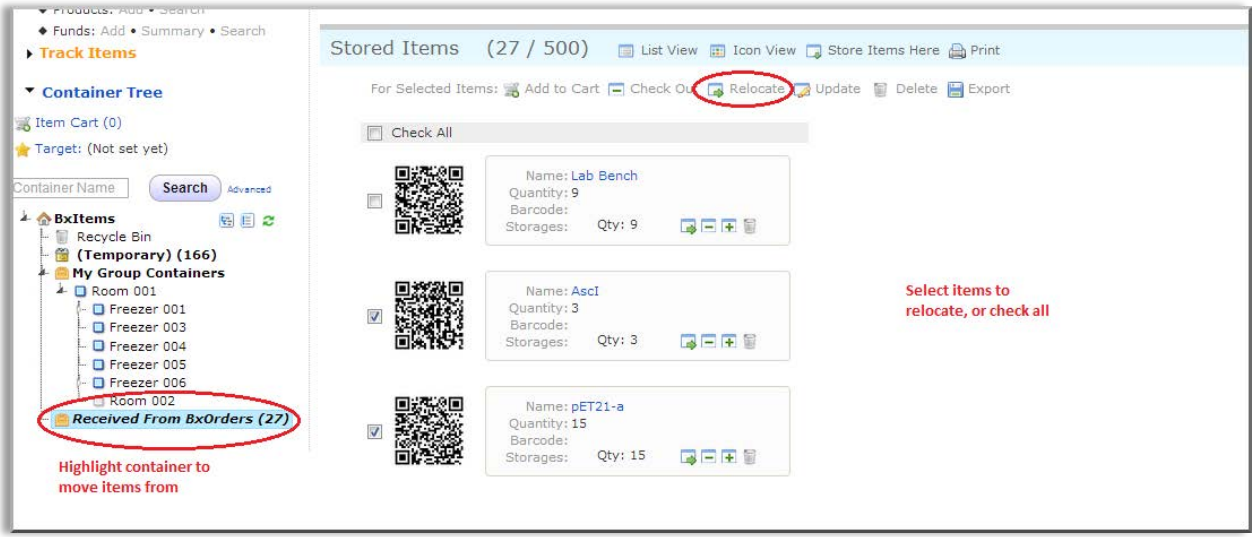
You may also re-arrange existing items using the same steps.

6.2: Relocate Items

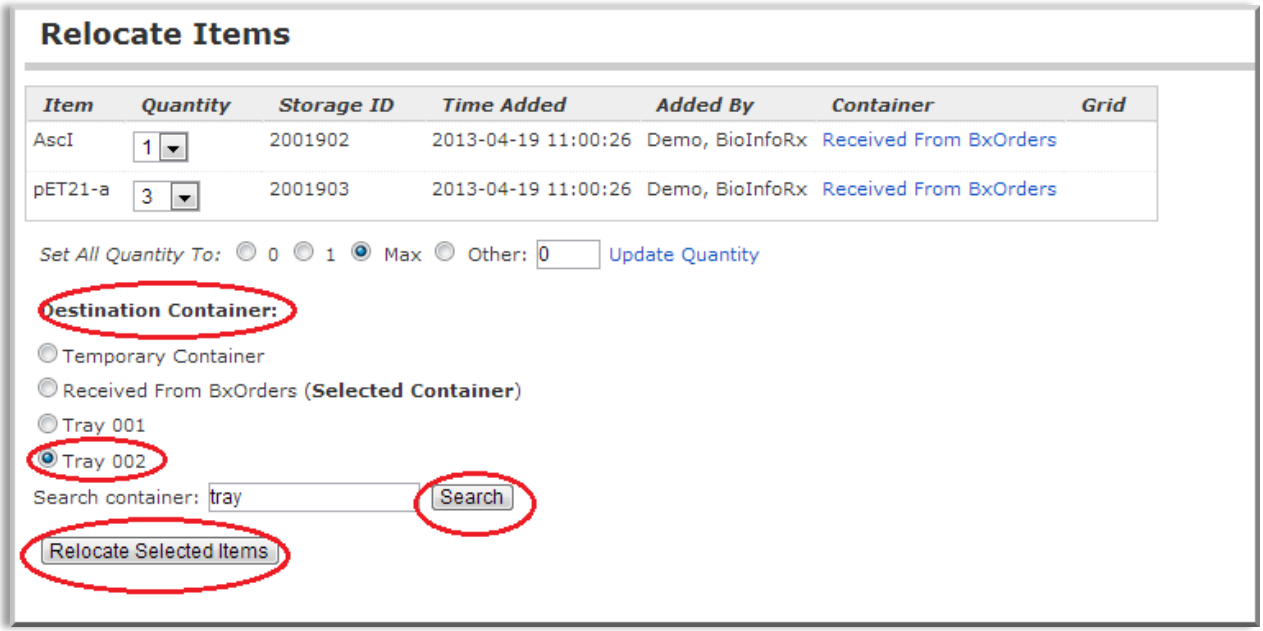
In this example, we will relocate items that are **Received From BxOrders**.

6.2.1: Basic Relocate Items

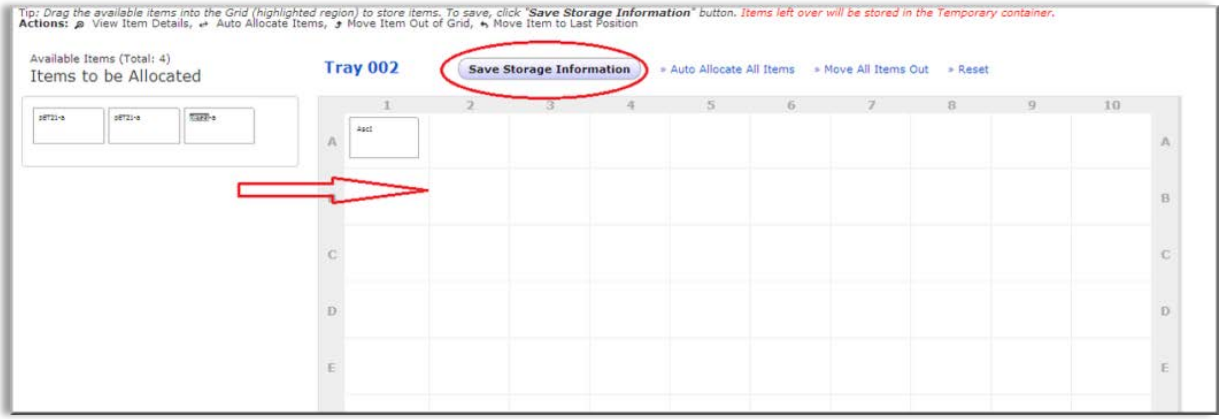
Step 1: To relocate items to a new container, begin by opening up your container tree to view the containers you wish to move the items from. Select the items you wish to relocate, and click the **Relocate** link.



Step 2: Select the quantity of each item to relocate, and choose or search for the destination container. We will type "tray" in the search box to bring up available trays for storage. Click **Relocate Selected Items**.

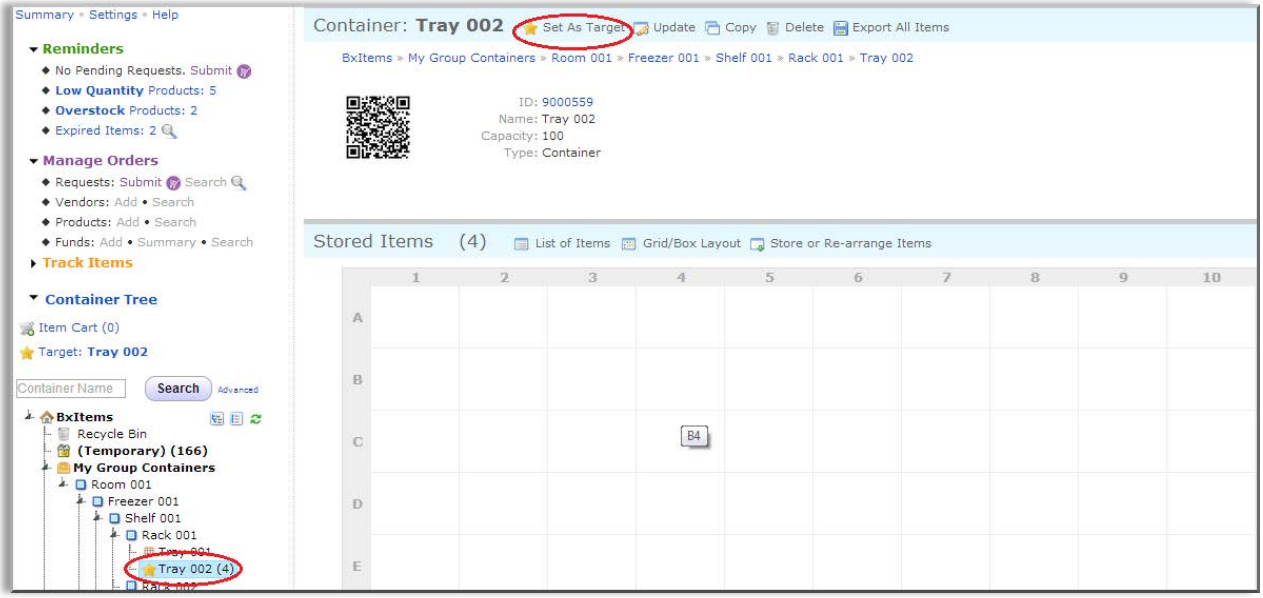


Step 3: Drag and Drop or auto-allocate items into the new container and save storage information.

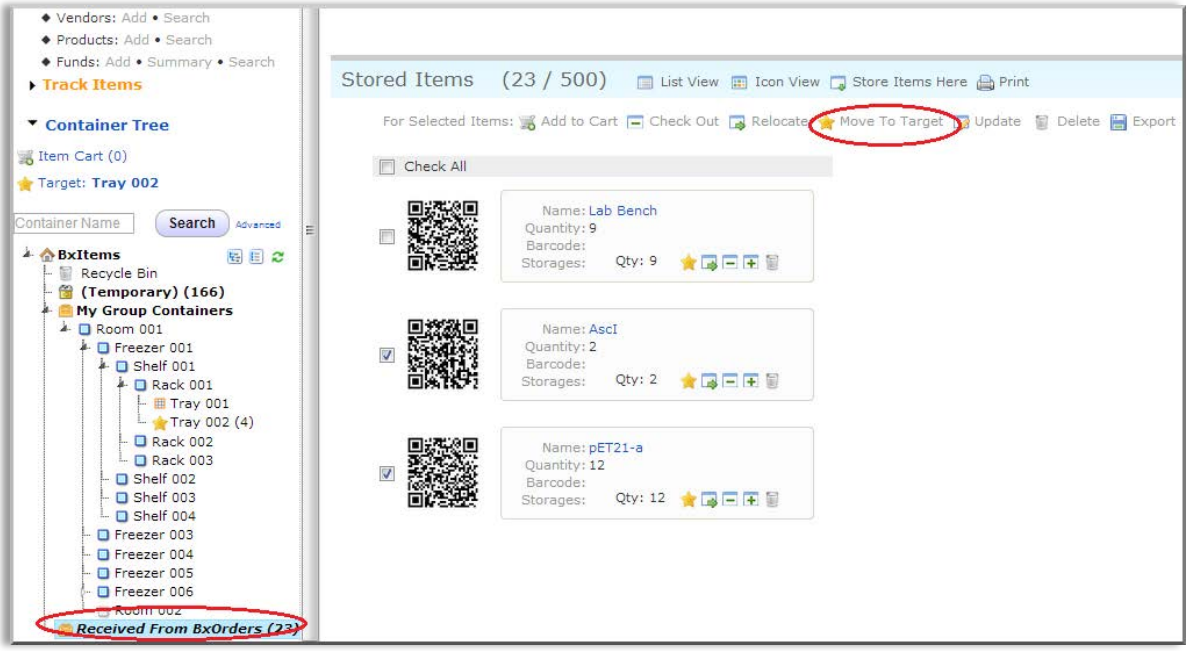


6.2.2: Relocate Items Using Target

To quickly set a destination container for relocating items, set it as the target.

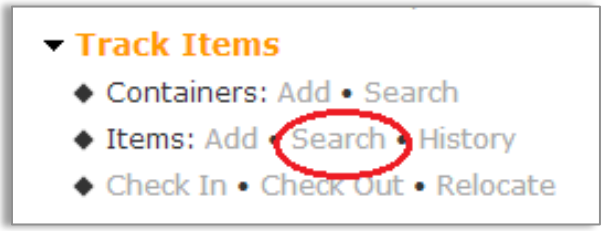


Go to the container to move items from, select items to relocate, and click Move to Target. Your target container will remain the same until it is changed.

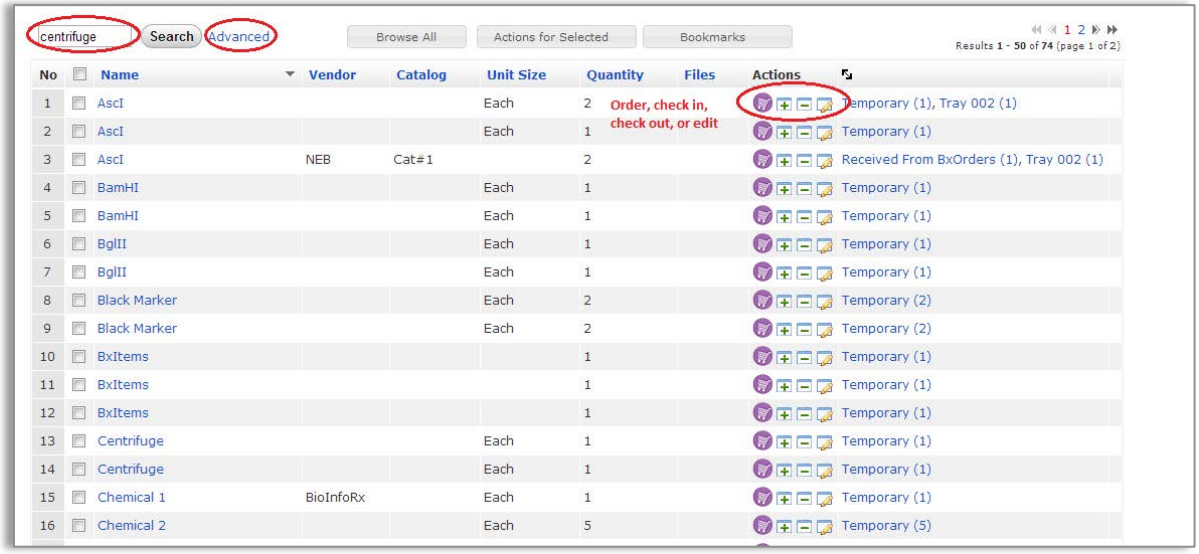


6.3: Search Items

To search for items, click **Items: Search** in the left sidebar menu.

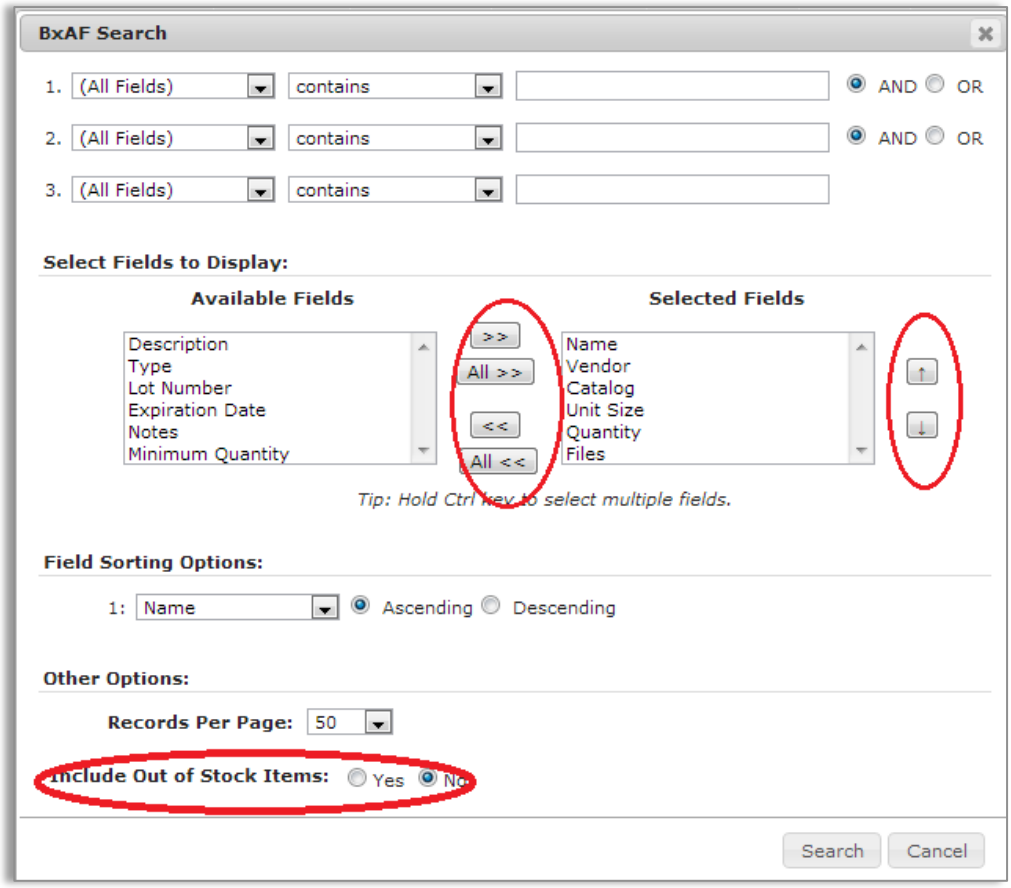


Type a simple search term for a quick search, or click the advanced button for a more detailed search and to change settings. You may also check in, check out, edit, or order items from the search menu using the icons on the right.



No	Name	Vendor	Catalog	Unit Size	Quantity	Files	Actions
1	AscI			Each	2		Temporary (1), Tray 002 (1)
2	AscI			Each	1		Temporary (1)
3	AscI	NEB	Cat#1		2		Received From BxOrders (1), Tray 002 (1)
4	BamHI			Each	1		Temporary (1)
5	BamHI			Each	1		Temporary (1)
6	BglII			Each	1		Temporary (1)
7	BglII			Each	1		Temporary (1)
8	Black Marker			Each	2		Temporary (2)
9	Black Marker			Each	2		Temporary (2)
10	BxItems				1		Temporary (1)
11	BxItems				1		Temporary (1)
12	BxItems				1		Temporary (1)
13	Centrifuge			Each	1		Temporary (1)
14	Centrifuge			Each	1		Temporary (1)
15	Chemical 1	BioInfoRx		Each	1		Temporary (1)
16	Chemical 2			Each	5		Temporary (5)

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page. You may also opt to search for out of stock items from the advanced menu.



6.4: Check Items In and Out

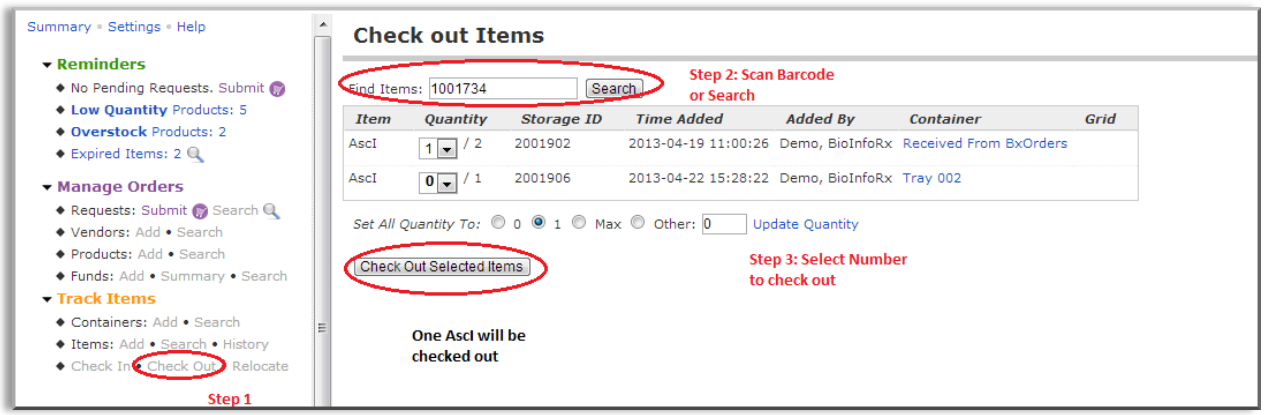
Items can be checked in or out using barcodes or by navigating to the item and selecting **Check In** or **Check Out**. You will need to have a 1D Barcode scanner attached to your computer for standard barcode reading, or, you can scan QR codes using a QR reader on your Internet-Enabled touch pad or Smart Phone with a camera. BxItems will keep track of the number of checked out items.

6.4.1: Check Items Out By Scanning a 1D Barcode

Step 1: Select **Check Out Items** from the left sidebar menu.

Step 2: Scan the barcode(s) using your 1-d barcode scanner. Your cursor must be in the barcode box. ***You may also type a search term in the Find Items Box as an alternate to using a barcode scanner.***

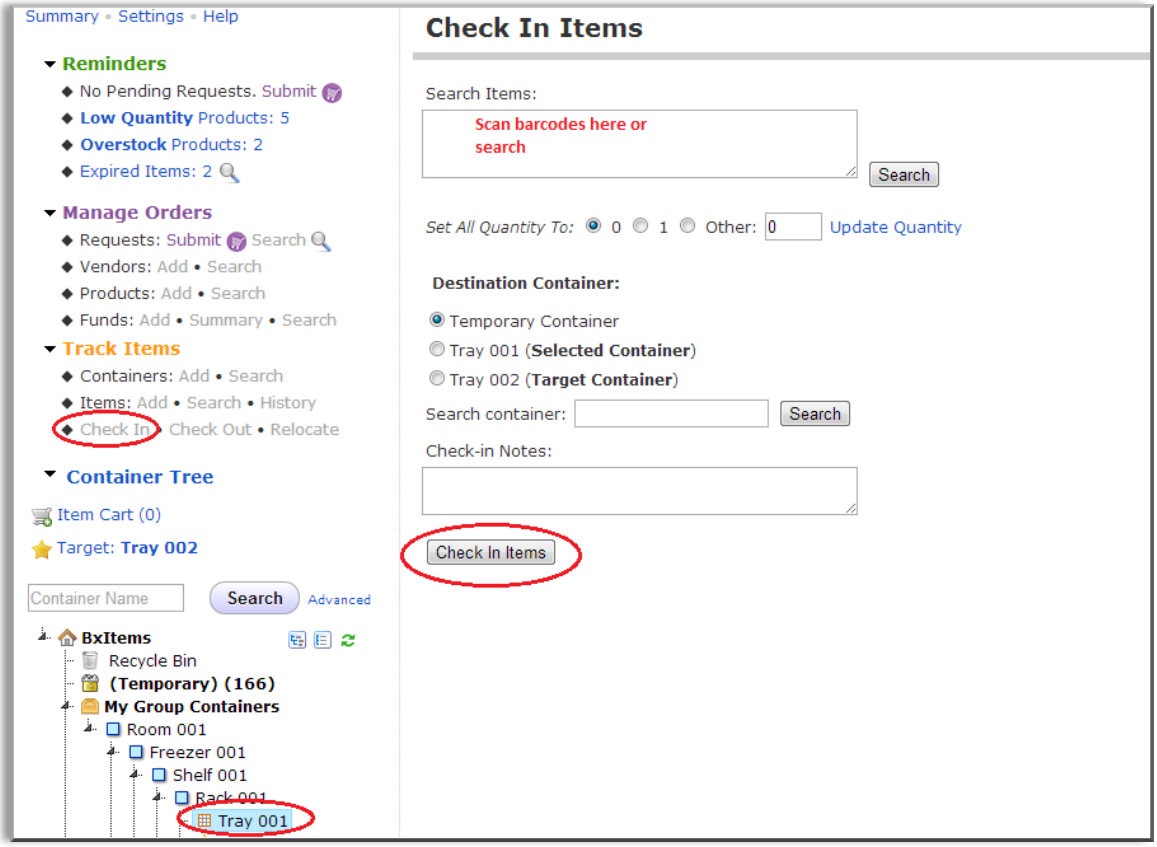
Step 3: Once the item is scanned, all items containing that barcode will appear in the list. Choose number to check out, and click **Check Out Items**.



6.4.2: Check Items In By Scanning a 1D Barcode

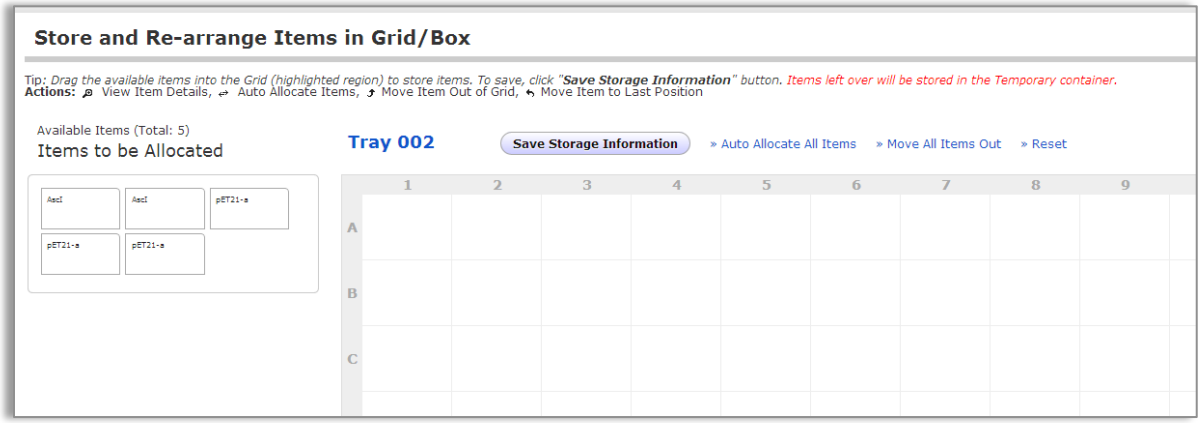
Step 1: Select **Check In Items** from the left sidebar menu.

Step 2: Scan the barcode(s) using your 1-d barcode scanner. Your cursor must be in the barcode box. ***You may also type a search term in the Find Items Box as an alternate to using a barcode scanner.***



Step 3: Once the item is scanned, all items containing that barcode will appear in the list. Choose number to check in, choose or search for a destination container, and click **Check In Items**. You may also set a target container or select a container to check items in to before scanning items.

Step 4: Drag and Drop Items Into Container Grids.

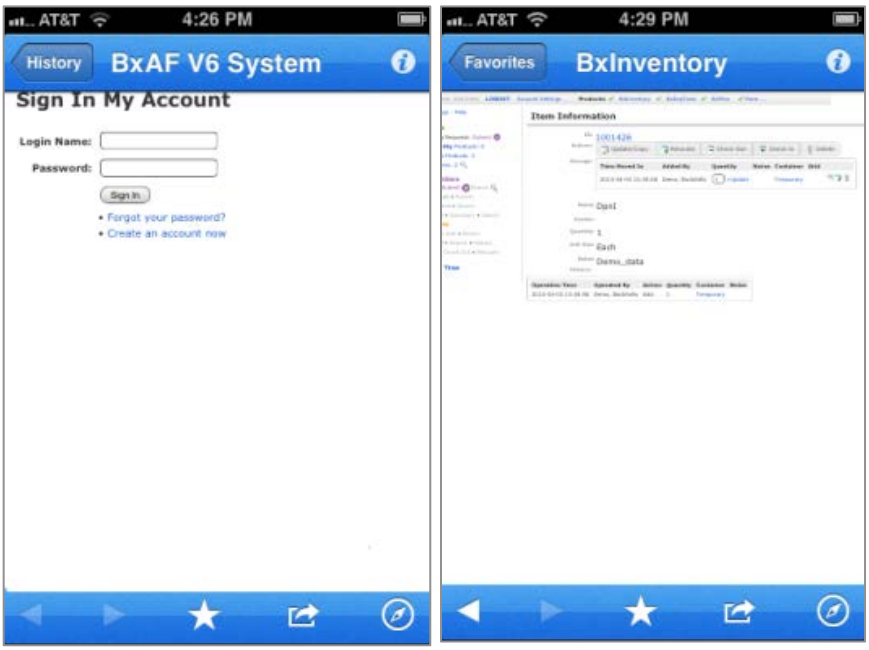


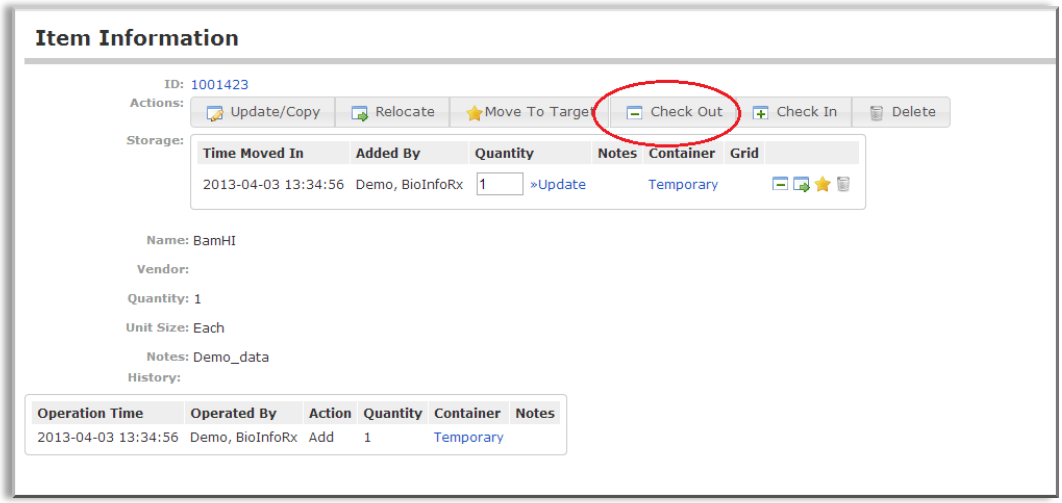
6.4.3: Check Items In or Out using QR Codes

To check items in or out using QR Codes, use your mobile device with QR reader installed.

A QR code will contain both the item ID number and the url of the item. Scanning the QR code will direct you to the item's web url, where it can be checked out.

Scan the item's QR code, and you will be directed to the item information as seen below. Proceed to check in or check out your items (if you are not logged in to BxInventory, you will be prompted to log in first).



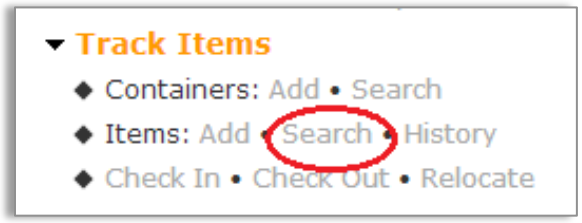


You may also attach QR Codes to your containers, allowing you to scan the barcode on the container and view its contents on your mobile device.

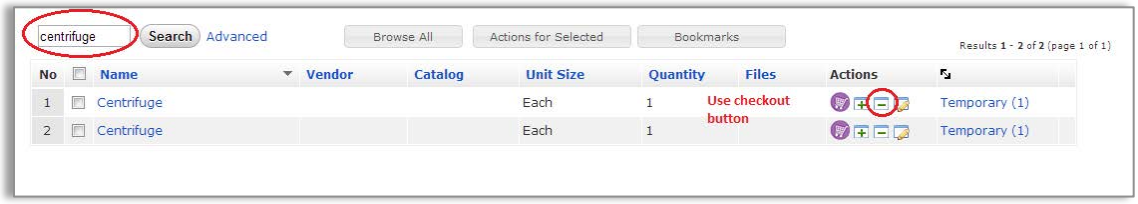
6.4.4: Check Items In or Out Without Scanning a Barcode

6.4.4.1: Check Items In or Out Method 1

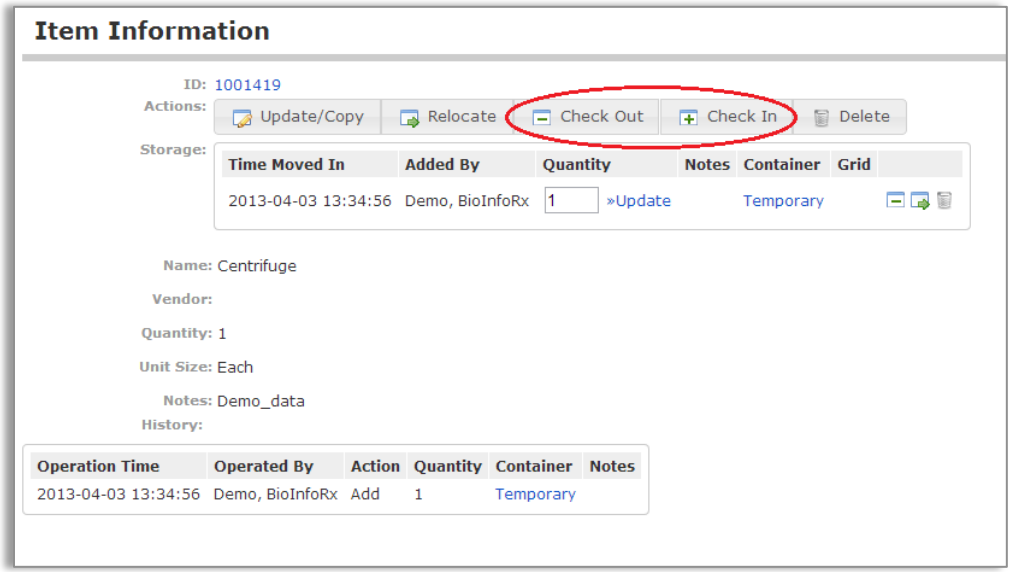
Search for an Item to check in or out:



Check in or out directly from search screen

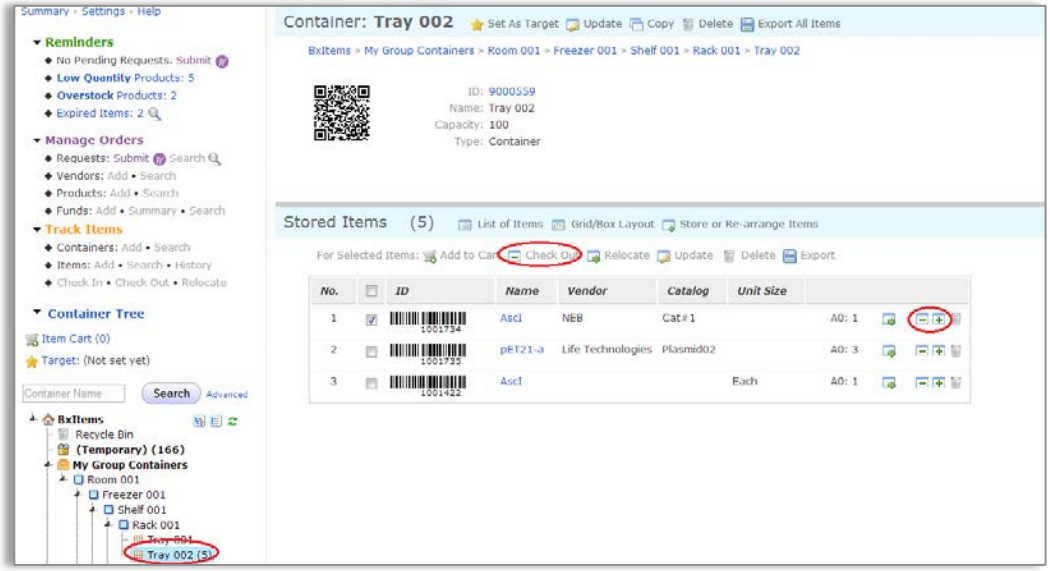


Or, open item detail and check in or out.



6.4.4.2: Check In or Out From a Container

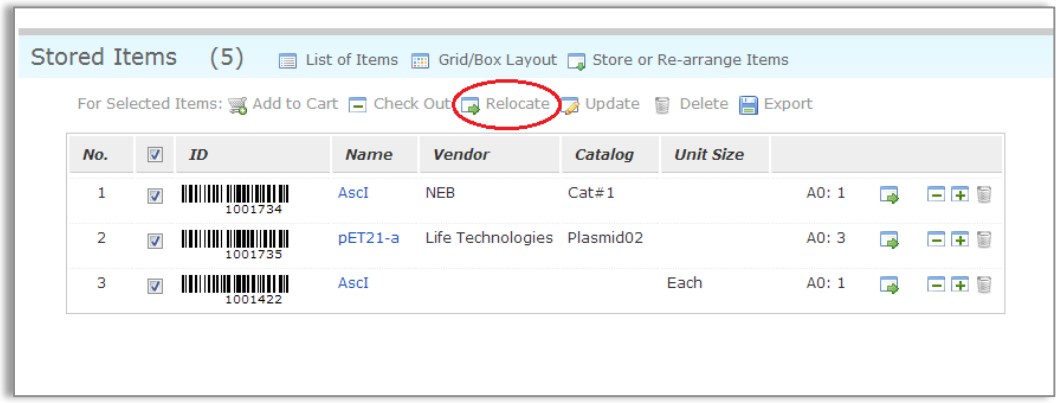
Navigate to the item in a container you wish to check out and select the item, then the **Check In** or **Check Out** Option. This will allow you to check items in or out of the container directly.



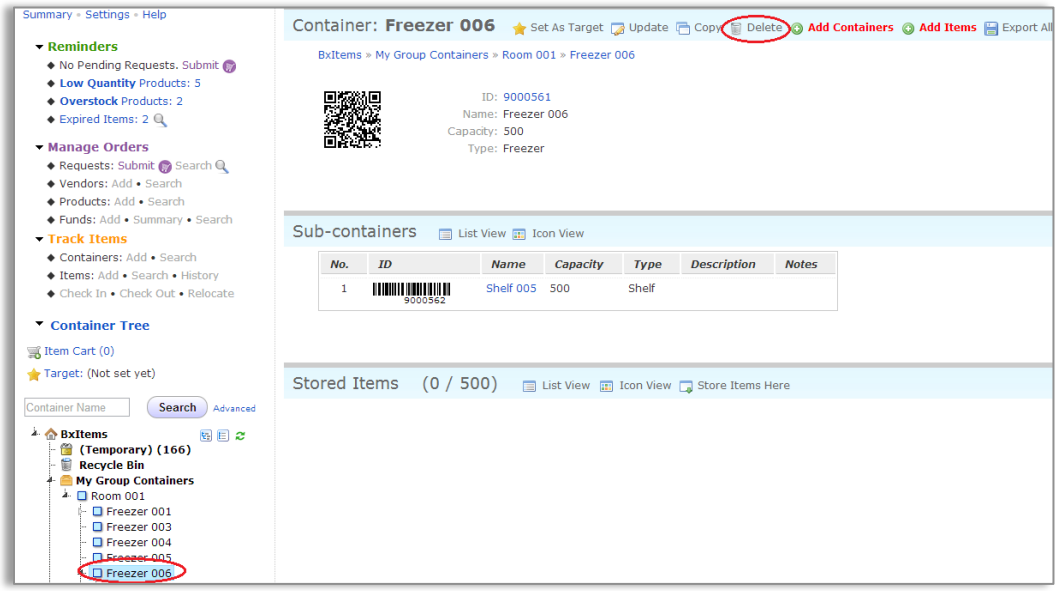
Section 7: Deleting Containers and Items

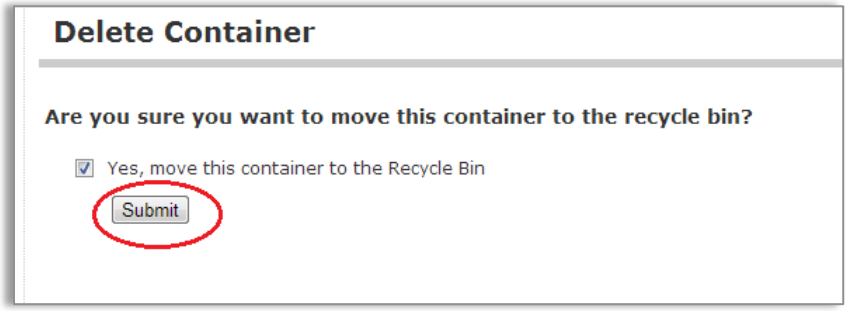
7.1: Deleting Containers

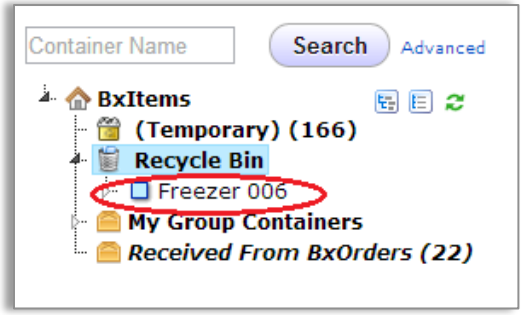
Containers may be deleted at any time. If you do not wish to delete the items in a container, move all items out (relocate) before deleting a container. If you do not relocate your items, they will be deleted (into recycle bin) with the container.



To delete a container, navigate to the container in the Container Tree, then click **Delete.** The container will be moved to the recycle bin until it is permanently deleted. All subcontainers will be moved to the recycle bin with the top container being deleted.







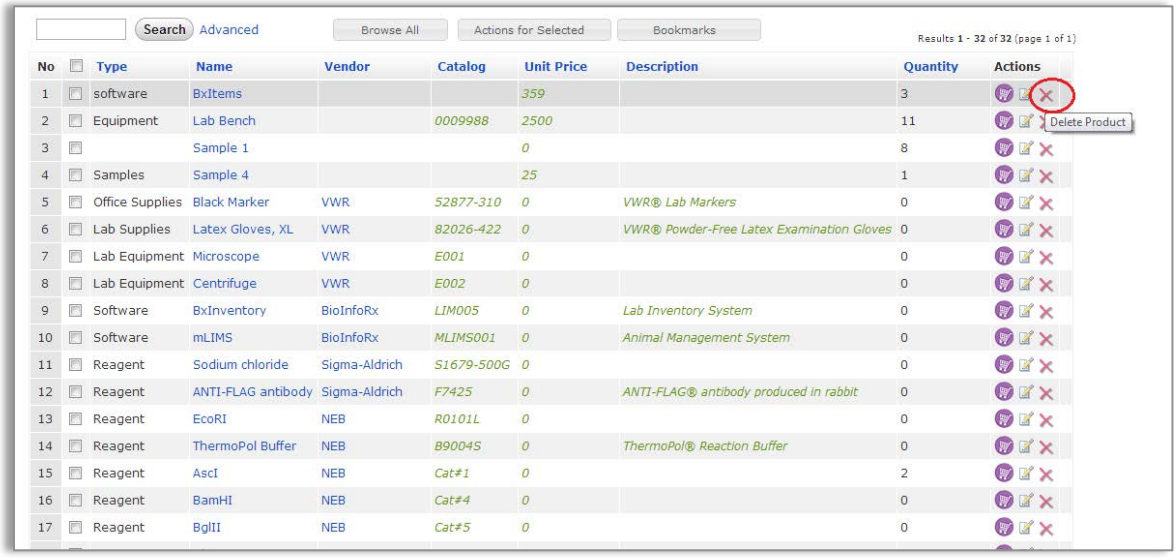
Containers in the recycle bin can be restored using the **Relocate Containers** method. Drag and drop the container from the recycle bin to its desired location.

7.2: Deleting Products and Items

Products include all items that may or not currently be stored in containers. Products and stored inventory items differ in how they are listed and deleted.

7.2.1: Delete Products

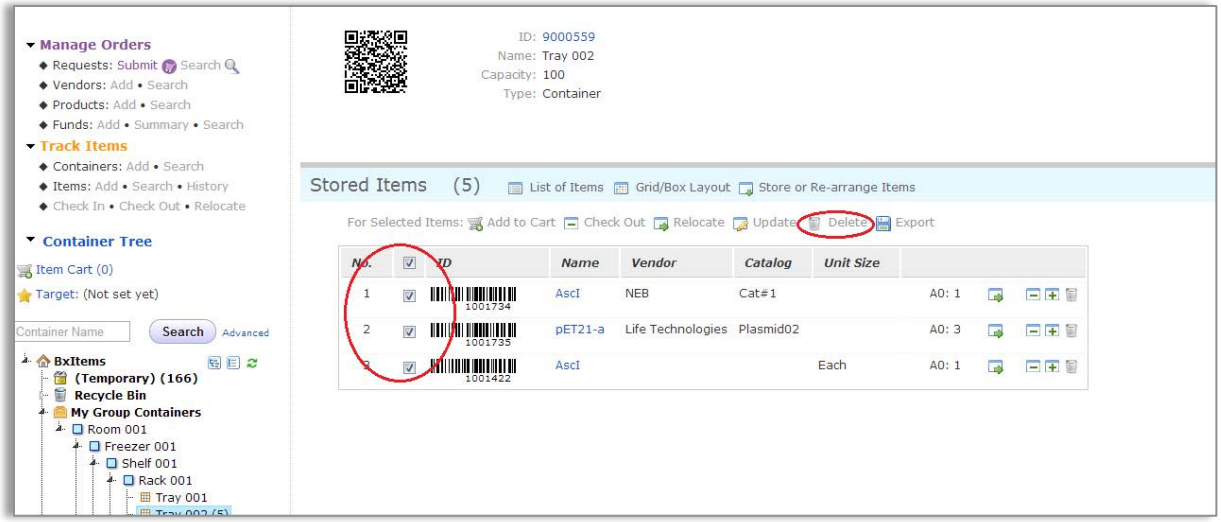
Products may deleted directly from the Search Products Page. Deleting a product will remove it from your inventory permanently.



No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	software	BxItems			359		3	
2	Equipment	Lab Bench		0009988	2500		11	
3		Sample 1			0		8	
4	Samples	Sample 4			25		1	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers	0	
6	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Gloves	0	
7	Lab Equipment	Microscope	VWR	E001	0		0	
8	Lab Equipment	Centrifuge	VWR	E002	0		0	
9	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System	0	
10	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System	0	
11	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0	
12	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	
13	Reagent	EcoRI	NEB	R0101L	0		0	
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0	
15	Reagent	AscI	NEB	Cat#1	0		2	
16	Reagent	BamHI	NEB	Cat#4	0		0	
17	Reagent	BglII	NEB	Cat#5	0		0	

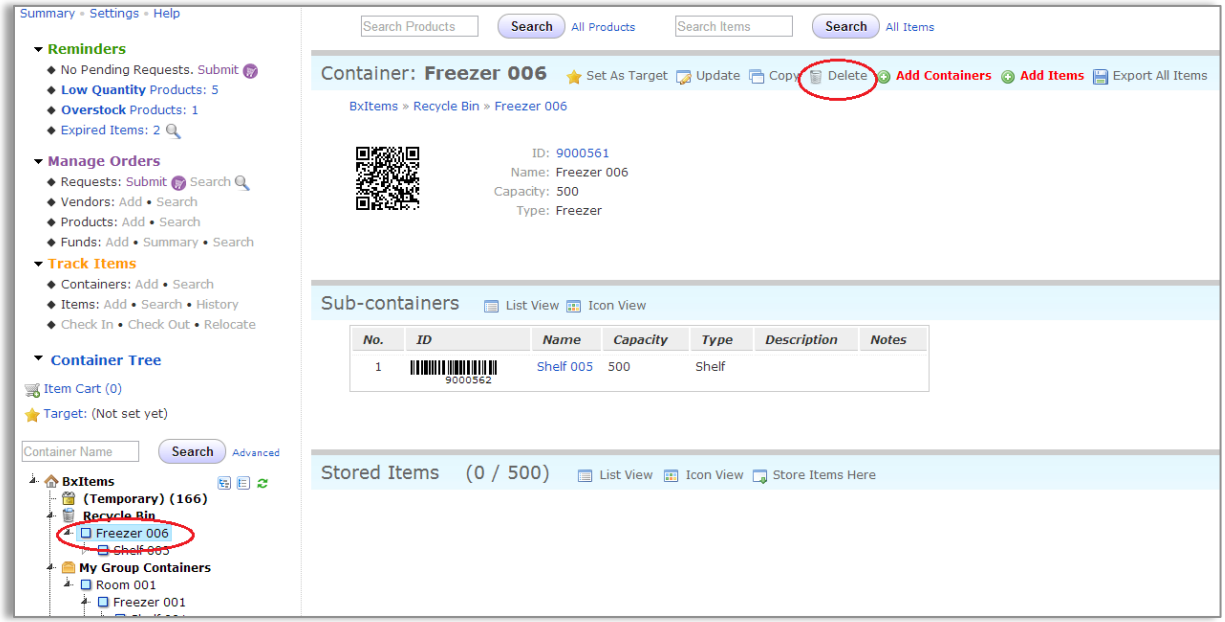
7.2.2: Delete Inventory Items

Inventory items in containers are deleted from their storage container by moving them to the Recycle Bin.

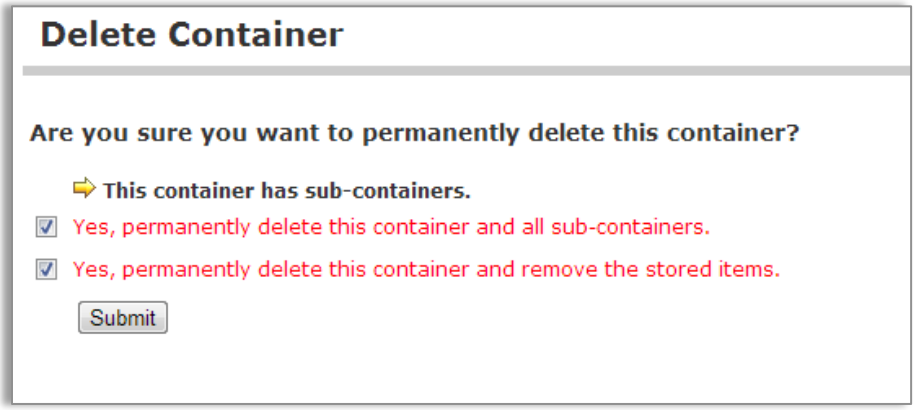


7.3: Empty Recycle Bin

To delete all items and containers in the Recycle Bin, highlight the container to remove from the Recycle Bin and Click **Delete**.



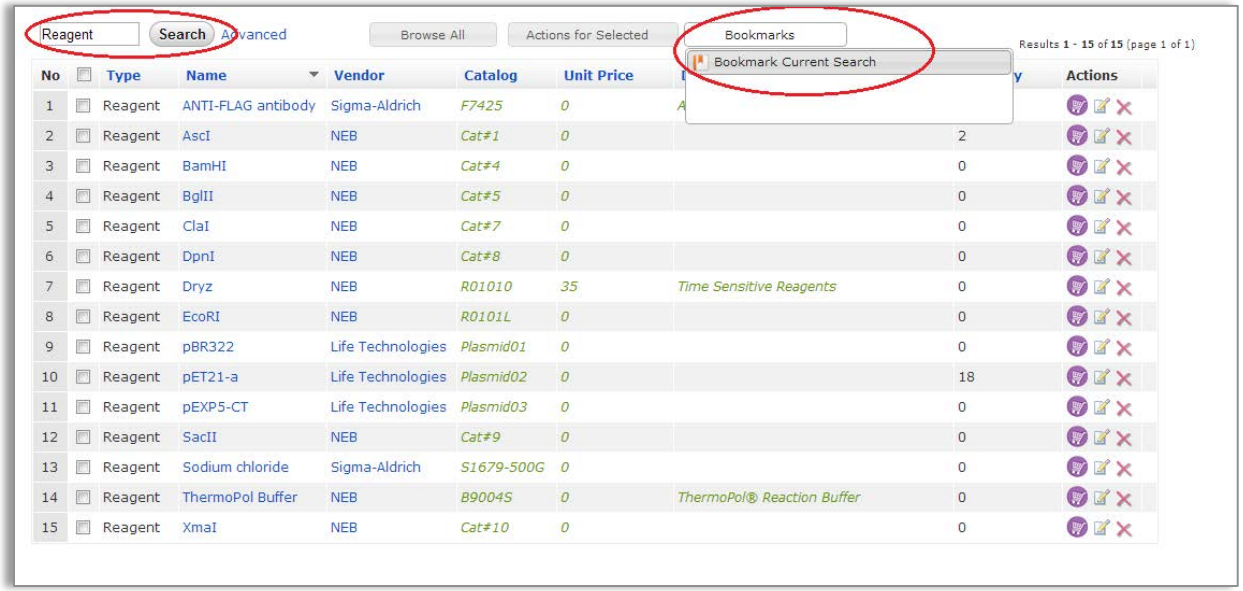
Verify your deletion and submit.



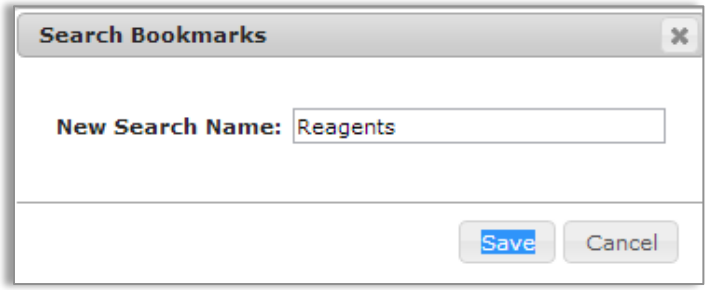
Section 8: Advanced Functions

8.1: Bookmark Searched Items

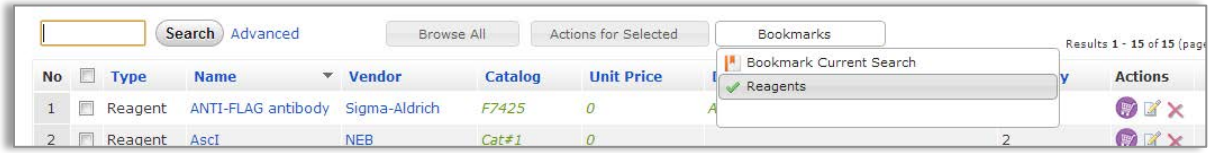
You can save any search (products, items, vendors, funds) as a bookmark/saved search. For example, easily find all of your reagents by saving your reagents product search. Search your term, then click **Bookmarks à Bookmark Current Search**.



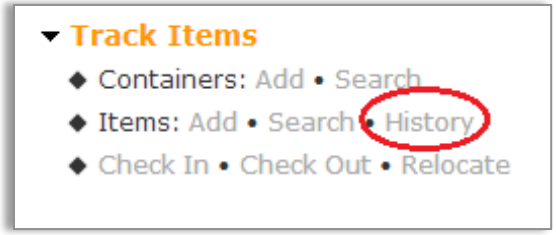
Name the Bookmark and Save.



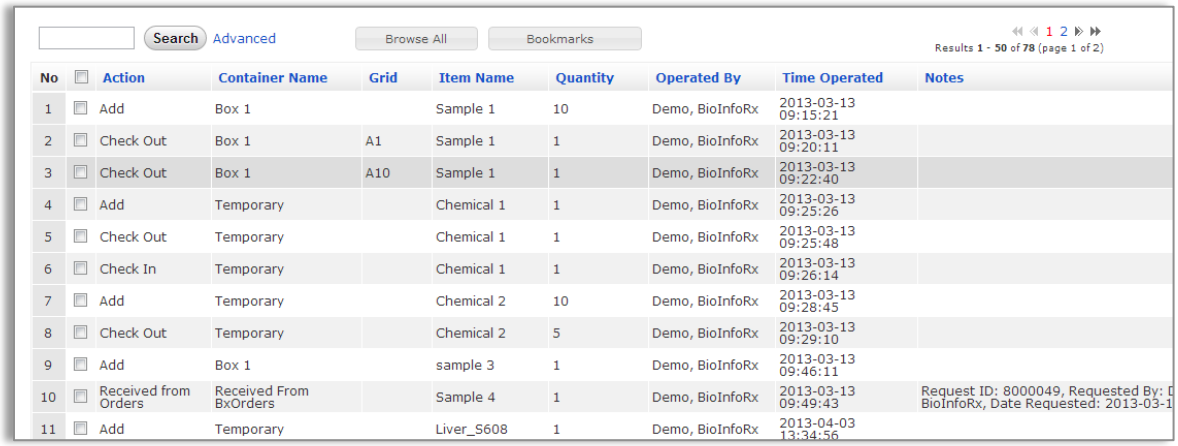
The next time you return to the Search Screen, your saved search will appear under Bookmarks.



8.2: Item History Logs



From the left sidebar menu, choose **Items – History**. You will be directed to your complete item history, which includes all actions performed with each item. Item History is searchable, sortable, and can be bookmarked.

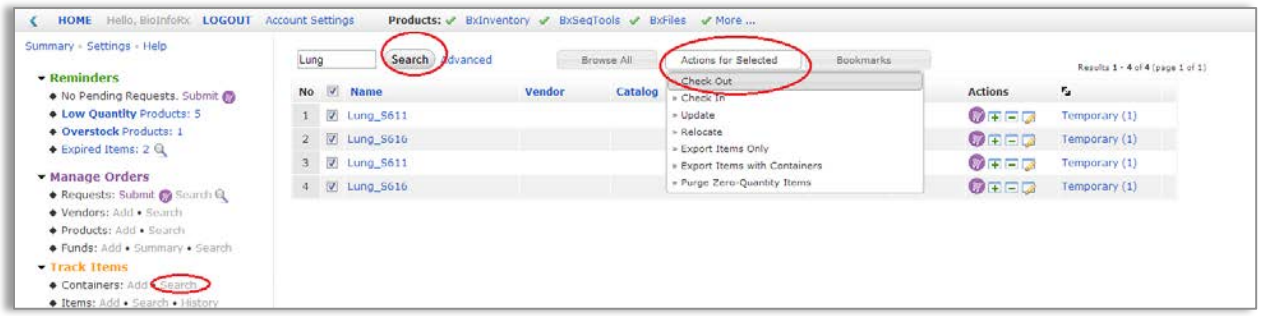


8.3 Bulk Actions

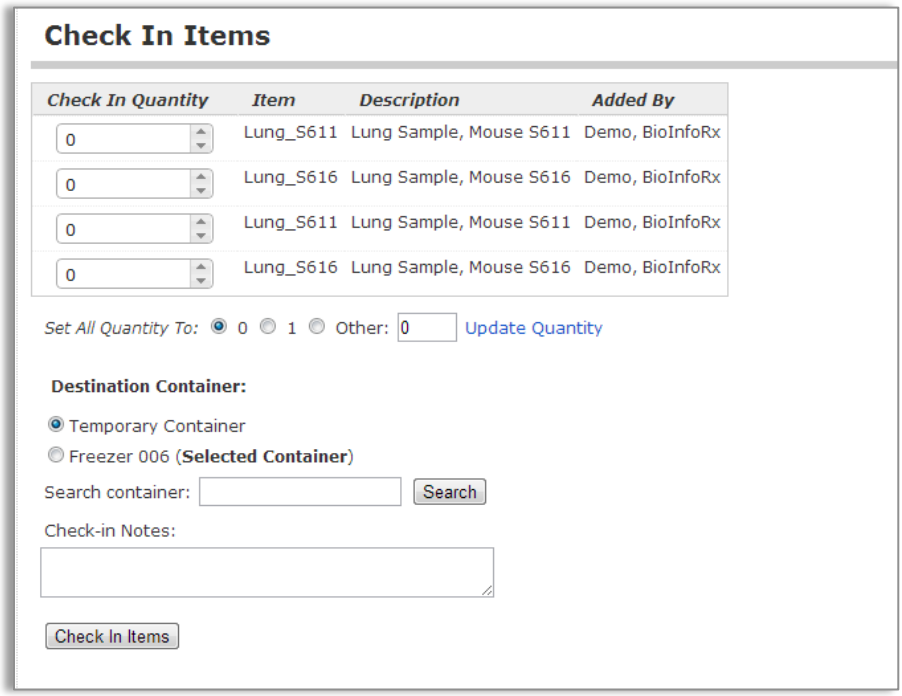
8.3.1: Bulk Check Out/Check In

Check in or check out several items at once using the Items-Search page.

Search item to check out, or select a group of items. With selected items, click Actions For Selected, then **Check Out** or **Check In**.



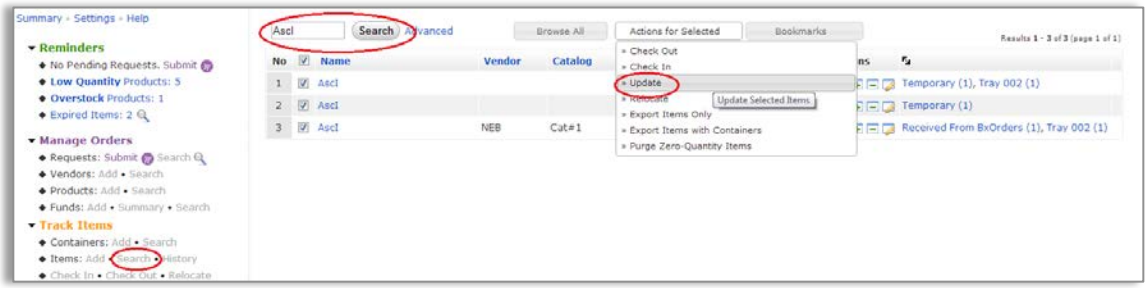
You may now check out or check in all of the selected items at once.



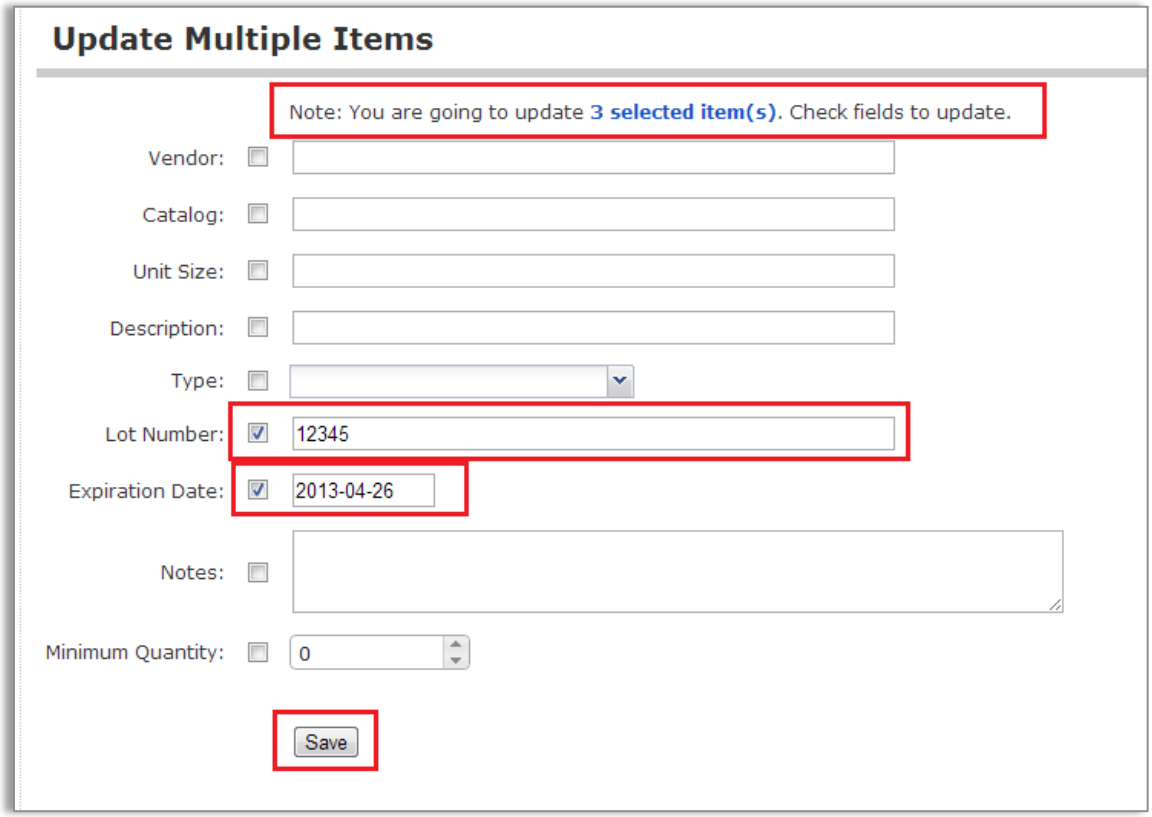
8.3.2: Bulk Update Items or Products

Bulk update several items or products at once using the Bulk Update feature.

Search item to update, or select a group of items. With selected items, click Actions For Selected, then **Update**.

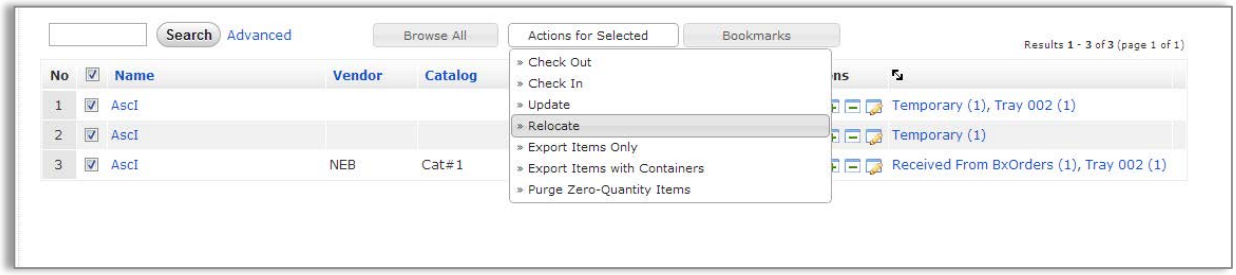


Check the fields you are updating to enter information. All items will update at once.



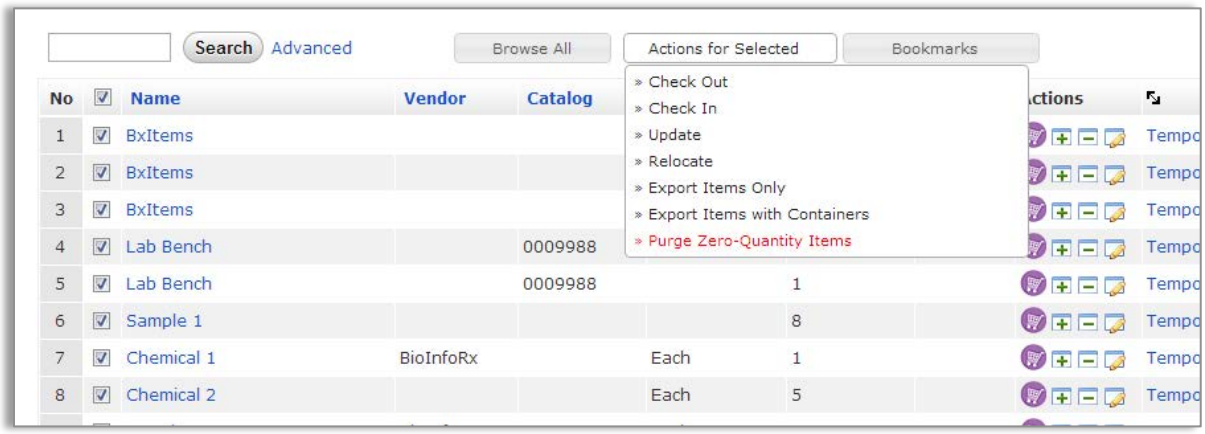
8.3.3: Bulk Relocate Items

Search items to relocate or select a group of items. With selected items, click Actions For Selected, then **Relocate**.



8.3.4: Purge Zero-Quantity Items

To purge Zero-quantity items, search for or select itemsand click Actions for Selected –Purge Zero-quantity Items.

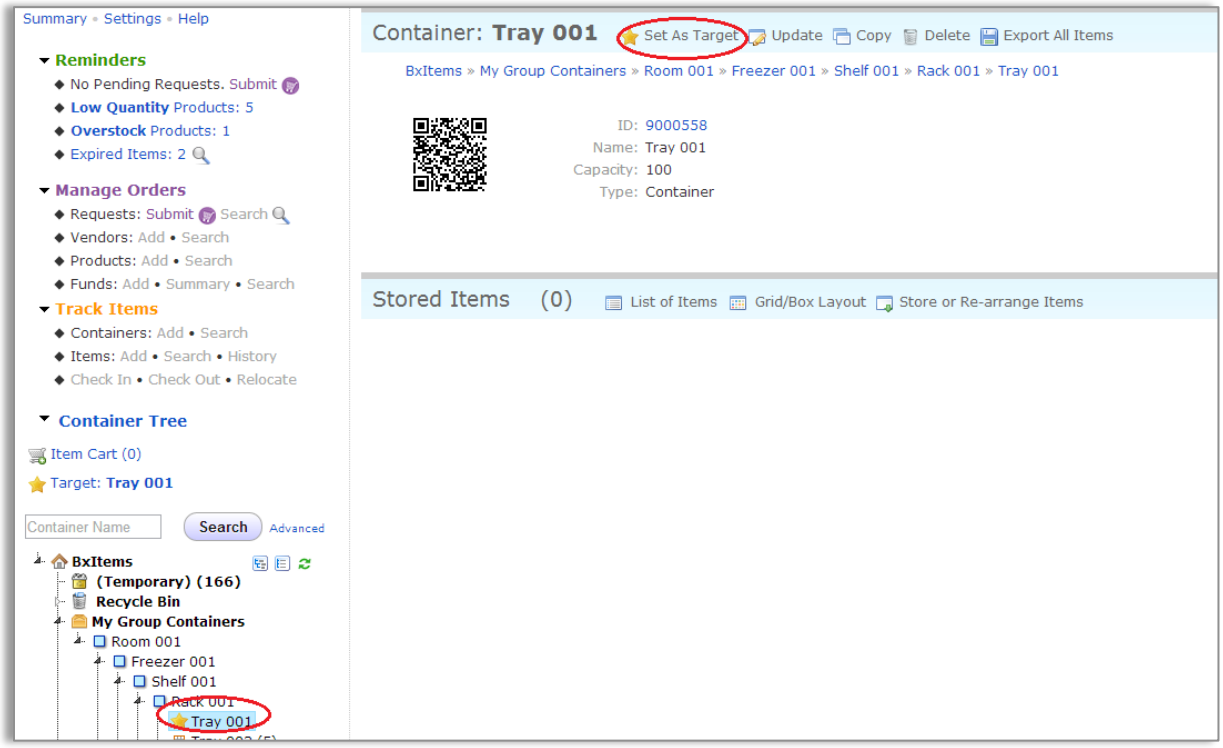


8.4: Item Shopping Cart

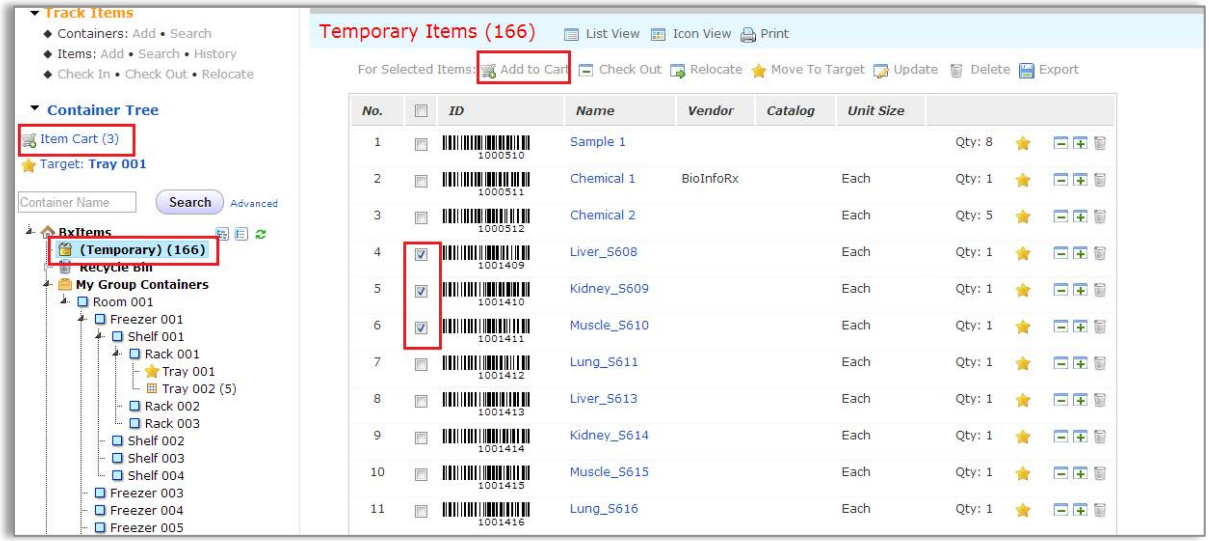
Sometimes, you may need to work with items that are stored across several containers. You can easily add items to your "shopping cart" and work with them as a group later.

For example, we want to move a few items from the **Temporary** and **Received From BxOrders** Containers to Tray 001.

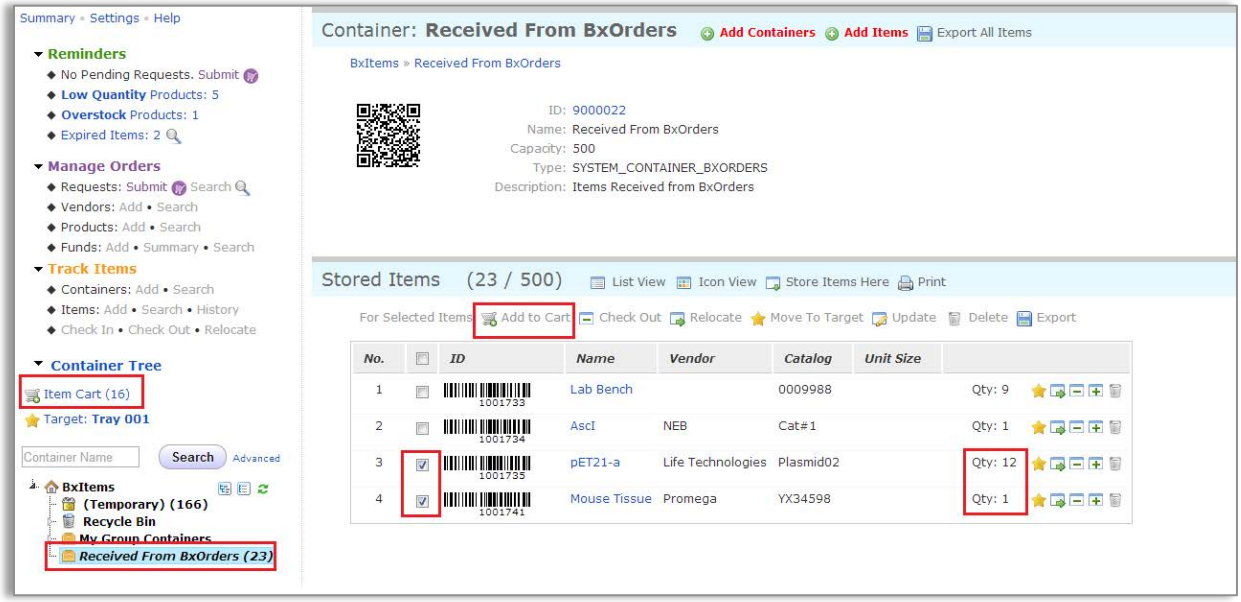
Step 1: Set Tray 001 as Target container.



Step 2: Go to the **Temporary Container**, select three samples, and click Add to cart. Notice that the **Shopping Cart** icon now shows 3 items.



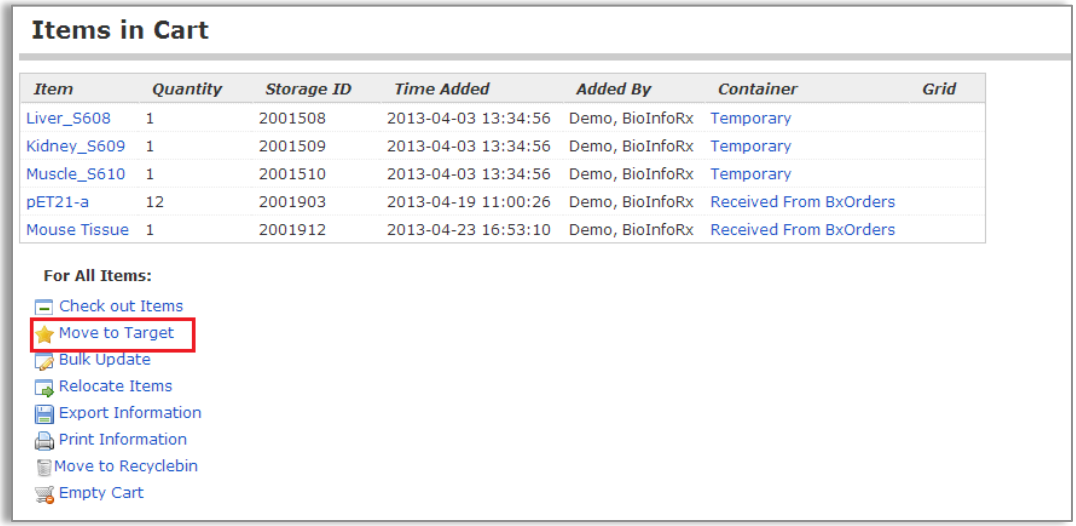
Step 3: Go to **Received From BxOrders**, select more items and add them to cart.



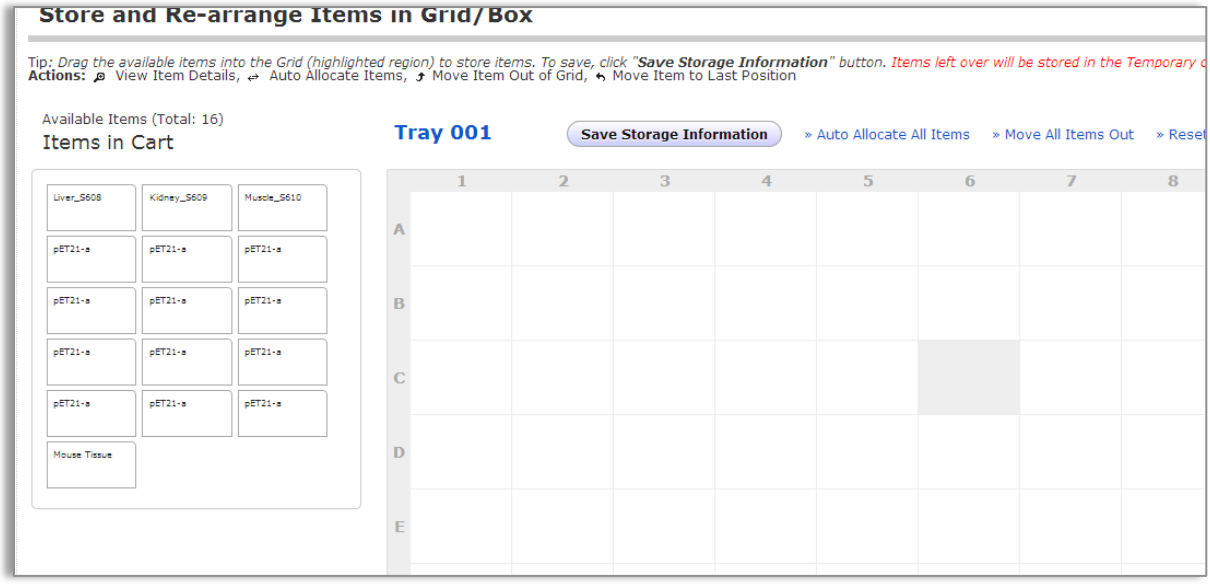
The Cart now contains 16 samples from two different locations.

Step 4: Click the Cart icon to perform actions such as Move, Relocate, Update, etc. You may also empty the cart from here.

We will simply click **Move to Target** to move the items to Sample Tray 001.



Step 5: Allocate Your Items.



Cart and Target are meant for temporary use for each session, and will expire when you log out.

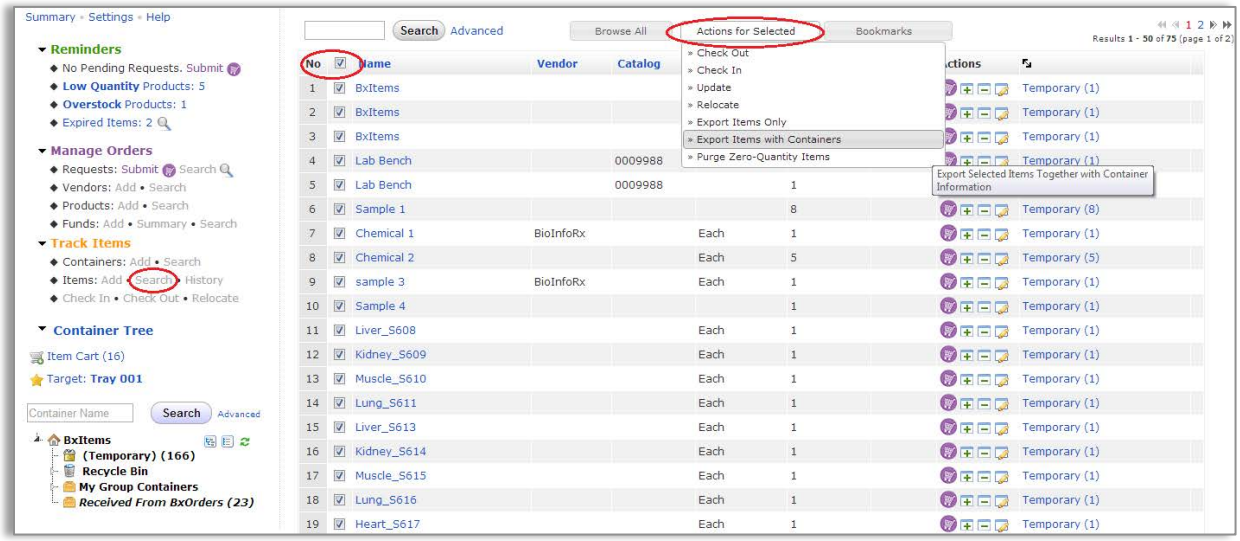
Section 9: Exporting Items and Containers

All exports are in Excel CSV format, and will download automatically when requested.

9.1: Export Items

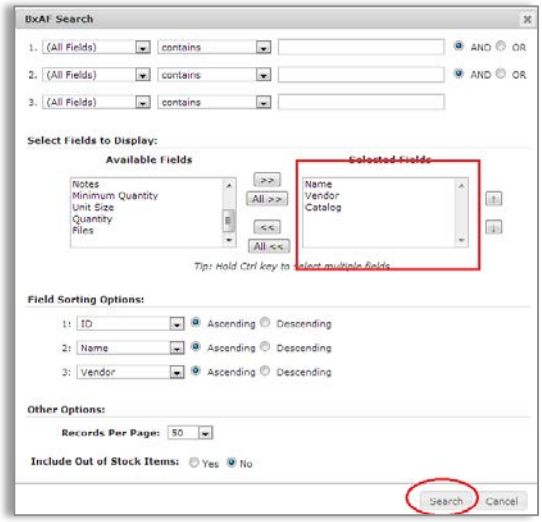
9.1.1: Basic Export

Go to **Items – Search** and **Browse All**. Select all items to export, and click **Actions For Selected** – **Export Items Only** or **Export Items With Containers**.



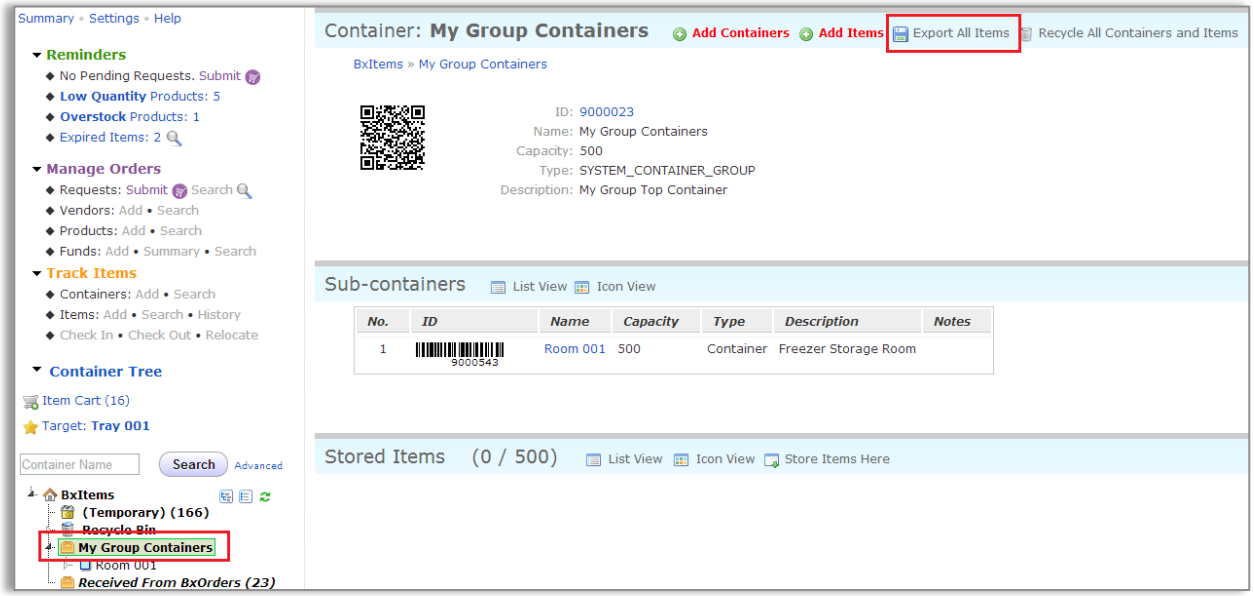
9.1.2: Advanced Export

To export selected fields, go to **Advanced** before exporting. Move desired fields to export to selected fields and click **Search**. Proceed to export as shown above.



9.3: Export All Items

To export all items in one full export, go to **My Group Containers** – **Export All Items.**

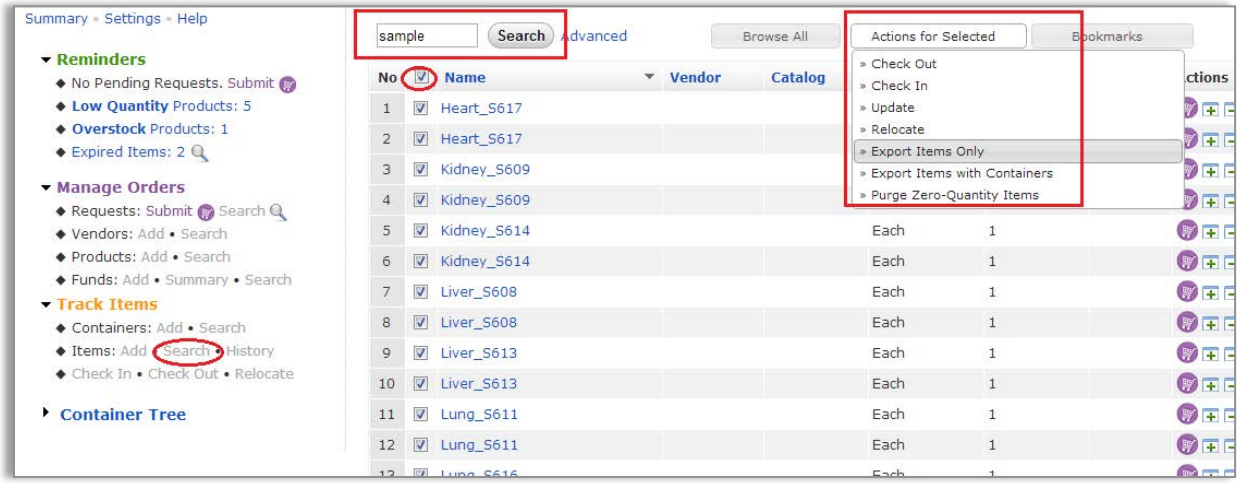


Section 10: Barcode Printing

Any label printer can print barcodes from Excel files. Some may require software. Export the items to print barcodes, and print the barcode field (saving the file as csv is standard).

10.1: Export Items For Barcode Printing

Step 1: Go to **Search** or **Browse** Items to begin your export. Search for certain items to export, or select all. Go To **Actions For Selected – Export Items Only**. Your CSV File will download.



Step 2: Open your Excel spreadsheet. There will be several fields. Delete fields you do not need.

Item ID will be the 1D barcode number, and item url will be the QR code number.

Choose additional fields for your label, such as Item name, Expiration. Delete all others.

Item ID	Item URL	Name	Quantity	Vendor	Catalog	Unit Size	Description	Type	Lot Numb	Expiration Date	Notes	Minimum Quantity
1000510	http://labinfoman.cor	Sample 1	8							3/15/2013		
1000513	http://labinfoman.cor	sample 3	1	BioInfoRx		Each		Supplies				0
1000514	http://labinfoman.cor	Sample 4	1					Samples				
1001409	http://labinfoman.cor	Liver_S608	1			Each	Liver Sample, Mouse S608				Demo_data	
1001410	http://labinfoman.cor	Kidney_S609	1			Each	Kidney Sample, Mouse S609				Demo_data	
1001411	http://labinfoman.cor	Muscle_S610	1			Each	Muscle Sample, Mouse S610				Demo_data	
1001412	http://labinfoman.cor	Lung_S611	1			Each	Lung Sample, Mouse S611				Demo_data	
1001413	http://labinfoman.cor	Liver_S613	1			Each	Liver Sample, Mouse S613				Demo_data	
1001414	http://labinfoman.cor	Kidney_S614	1			Each	Kidney Sample, Mouse S614				Demo_data	
1001415	http://labinfoman.cor	Muscle_S615	1			Each	Muscle Sample, Mouse S615				Demo_data	
1001416	http://labinfoman.cor	Lung_S616	1			Each	Lung Sample, Mouse S616				Demo_data	
1001417	http://labinfoman.cor	Heart_S617	1			Each	Heart Sample, Mouse S617				Demo_data	
1001440	http://labinfoman.cor	Liver_S608	1			Each	Liver Sample, Mouse S608				Demo_data	
1001441	http://labinfoman.cor	Kidney_S609	1			Each	Kidney Sample, Mouse S609				Demo_data	

For 1D Barcodes, your final sheet should look something like this.

Item ID	Name	Expiration Date
1000510	Sample 1	3/15/2013
1000513	sample 3	
1000514	Sample 4	
1001409	Liver_S608	
1001410	Kidney_S609	
1001411	Muscle_S610	
1001412	Lung_S611	
1001413	Liver_S613	
1001414	Kidney_S614	
1001415	Muscle_S615	
1001416	Lung_S616	
1001417	Heart_S617	
1001440	Liver_S608	
1001441	Kidney_S609	

For QR codes, your final sheet should look something like this.

A	B	C	D
Item ID	Item URL	Name	Expiration Date
1000510	http://labinfoman.cor	Sample 1	3/15/2013
1000513	http://labinfoman.cor	sample 3	
1000514	http://labinfoman.cor	Sample 4	
1001409	http://labinfoman.cor	Liver_S608	
1001410	http://labinfoman.cor	Kidney_S609	
1001411	http://labinfoman.cor	Muscle_S610	
1001412	http://labinfoman.cor	Lung_S611	
1001413	http://labinfoman.cor	Liver_S613	
1001414	http://labinfoman.cor	Kidney_S614	
1001415	http://labinfoman.cor	Muscle_S615	
1001416	http://labinfoman.cor	Lung_S616	
1001417	http://labinfoman.cor	Heart_S617	
1001440	http://labinfoman.cor	Liver_S608	
1001441	http://labinfoman.cor	Kidney_S609	
1001442	http://labinfoman.cor	Muscle_S610	
1001443	http://labinfoman.cor	Lung_S611	
1001444	http://labinfoman.cor	Liver_S613	
1001445	http://labinfoman.cor	Kidney_S614	
1001446	http://labinfoman.cor	Muscle_S615	

Step 3: Save your file as a CSV file for label printing.

10.2: Print Barcode Label

Your completed export file is now ready to connect to your label printer.

Container ID's may also be printed, such as barcodes and labels for freezers, using the same steps.

BxInventory recommends and fully supports Bartender Barcode Label Software, which can be purchased with BxInventory. See our printer guide documents for further information on barcode printing.